



Quick Reference Guide

©2000-2011 ALLDATA LLC. ALLDATA is a registered trademark and ALLDATA Manage is a mark of ALLDATA LLC. All rights reserved. QuickBooks® and EasyStep are trademarks or service marks of Intuit Inc.

Last update: January 10, 2011.

ALLDATA MANAGE Contents

About this Quick Reference Guide and the Help System	1
Help System	1
Help Buttons	2
Chapter 1: Shortcut and Menu Bars	3
Shortcut Bar	3
Menu Bar	4
Chapter 2: Setting Up Your Company Information	8
Company Setup	8
Setting General Company Information	10
Setting Taxes, Markups, and Other Charges	11
Setting Print Format	17
Setting Data Validation Levels	19
Setting Setup Information	20
Setting Preferences	22
Catalog Setup	23
Chapter 3: Adding Shop Data	24
Creating Employee Records	24
Creating Labor Rates	26
Creating Disclaimers	28
Creating Job Status Codes	30
Creating Miscellaneous Charges	32
Creating Customer Types	33
Creating and Processing Customer Follow-up Messages	35
Chapter 4: Adding Customer and Vehicles	44
Adding Customers	44
Adding Vehicles	51
Chapter 5: Creating Orders, Jobs, and Line Items	55
Creating New Orders	55
Creating Jobs	59
Creating Shop Jobs	70
Creating Counter Sales	72
Chapter 6: Saving and Converting Repair Orders	74
Saving an Order as an Estimate	74
Saving an Order as a Repair Order	74
Saving an Order as an Appointment	74
Converting a Repair Order to an Invoice	75
Saving a Repair Order	75
Saving a Counter Sale	75

ALLDATA MANAGE Quick Reference Guide

Converting an Invoice Back to a Repair Order	75
Chapter 7: Work in Progress, Additions and Changes	76
Work in Progress Window	76
Viewing Work in Progress	77
Editing Jobs and Items	78
Removing Hazardous Materials or Shop Supply Charges	80
Adding Discounts	81
To Revise a Repair Order	82
Chapter 8: Catalogs	86
Adding Parts to Jobs from the Catalog Viewer	86
Checking the Price and Availability of Parts selected from the AfterMarket Catalogs	89
Adding Parts to Jobs from the OEM and AfterMarket Catalogs	90
Chapter 9: Documenting, Closing and Posting Orders	94
Adding Actuals and Details	94
Applying Deposits	94
Applying Payments	97
Posting Invoices and Counter Sales	98
Chapter 10: Service History	99
Chapter 11: Premium Features	100
Accounting Integration	100
AutoAdmin Appointment Import	101
Customer Follow-up Messages	101
End Of Day Process, Reports	104
Editable Payment Records	105
Inventory	105
Vendor Invoice Number on Repair Orders	117
Job Category Maintenance	118
Price Matrix	119
Profit Margin Analysis	120
Recommendations	122
Scheduled Appointments	123
Security Profiles	130
Chapter 12: Reports	133
Basic Report Procedure	133
Reports by Menu	134
Reports Alphabetically	141
Report Menus	150
Chapter 13: Repair Information	154
Accessing Repair Information	154
Service Precaution	155
Application and ID	155
Testing and Inspection	155
Locations	156
Diagrams	156

ALLDATA MANAGE Quick Reference Guide

Zoom	156
Specifications	157
Technical Service Bulletins.....	157
Tools and Equipment	157
Fundamentals and Basics.....	158
Diagnostic Trouble Codes	158
Chapter 14: Data Transfers (Exporting Data).....	159
Exporting XML Data	159
Exporting Excel Data	161
Exporting MARKET Data.....	162
AutoAdmin Utility	165
Chapter 15: Database Backups	167

About this Quick Reference Guide and the Help System

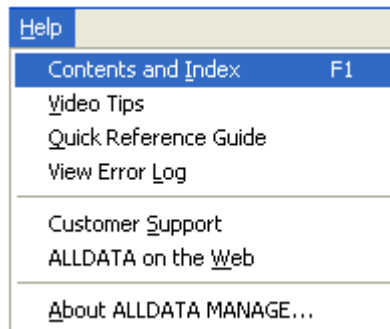
This manual is designed to help you get started with your daily shop management software tasks, such as setting up your shop information, entering customers and creating estimates and repair orders. Because it is concerned with getting you started, it does not cover topics such as deleting information. See the help system for more comprehensive information.

Help System

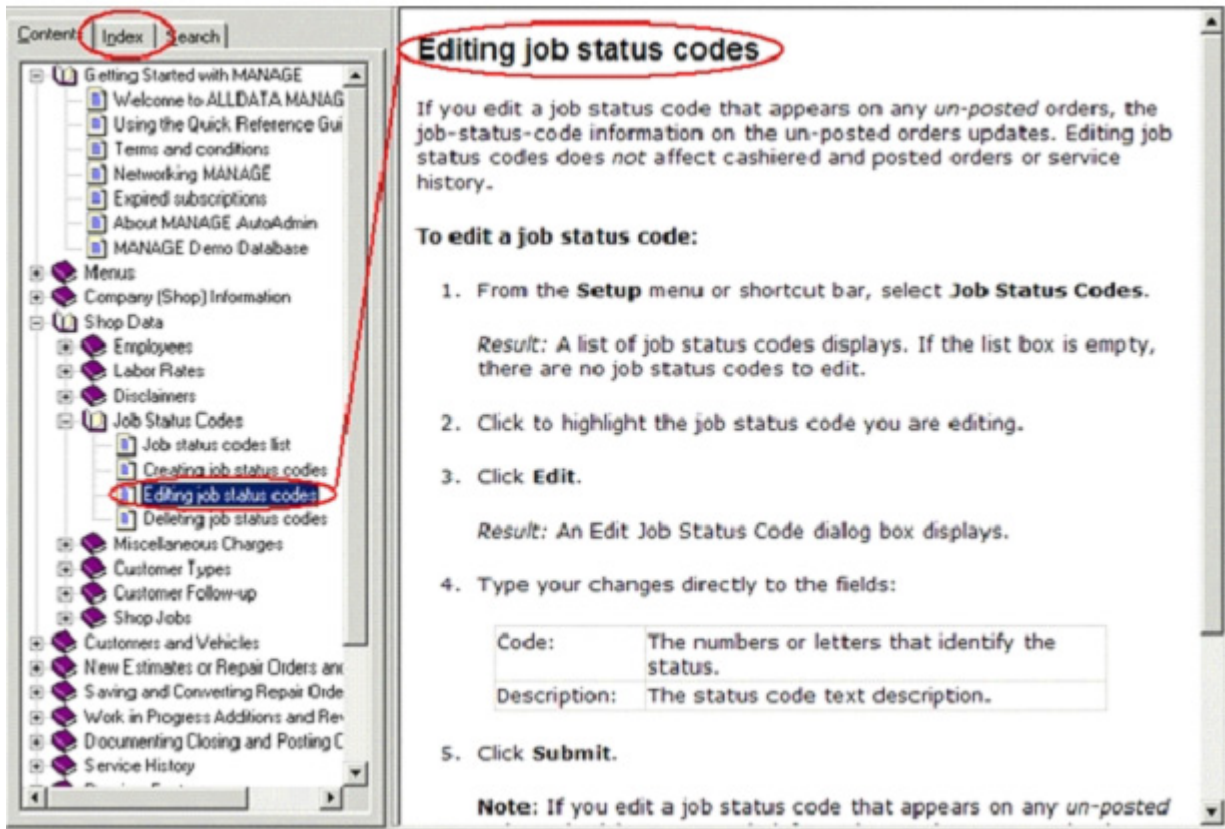
MANAGESM has a comprehensive on-line help system that you view and navigate on your computer screen. If you do not find the information or procedure that you need in this manual, look for it in the help system.

To access the help system:

1. You must have access to the internet.
2. In **MANAGE**, select the **Help** menu.
3. Select **Contents and Index**.
Result: The help system opens in a separate window.



- Click the books and topics on the left side to browse through the contents, or select the **Index** tab to enter search words.



Help Buttons

You will also see the following two help buttons within Manage. Click a help button to find more information about the window or message you are currently viewing.

Screen help button

This help button is available on most windows. Click the button for help topics related to the specific window you are viewing.

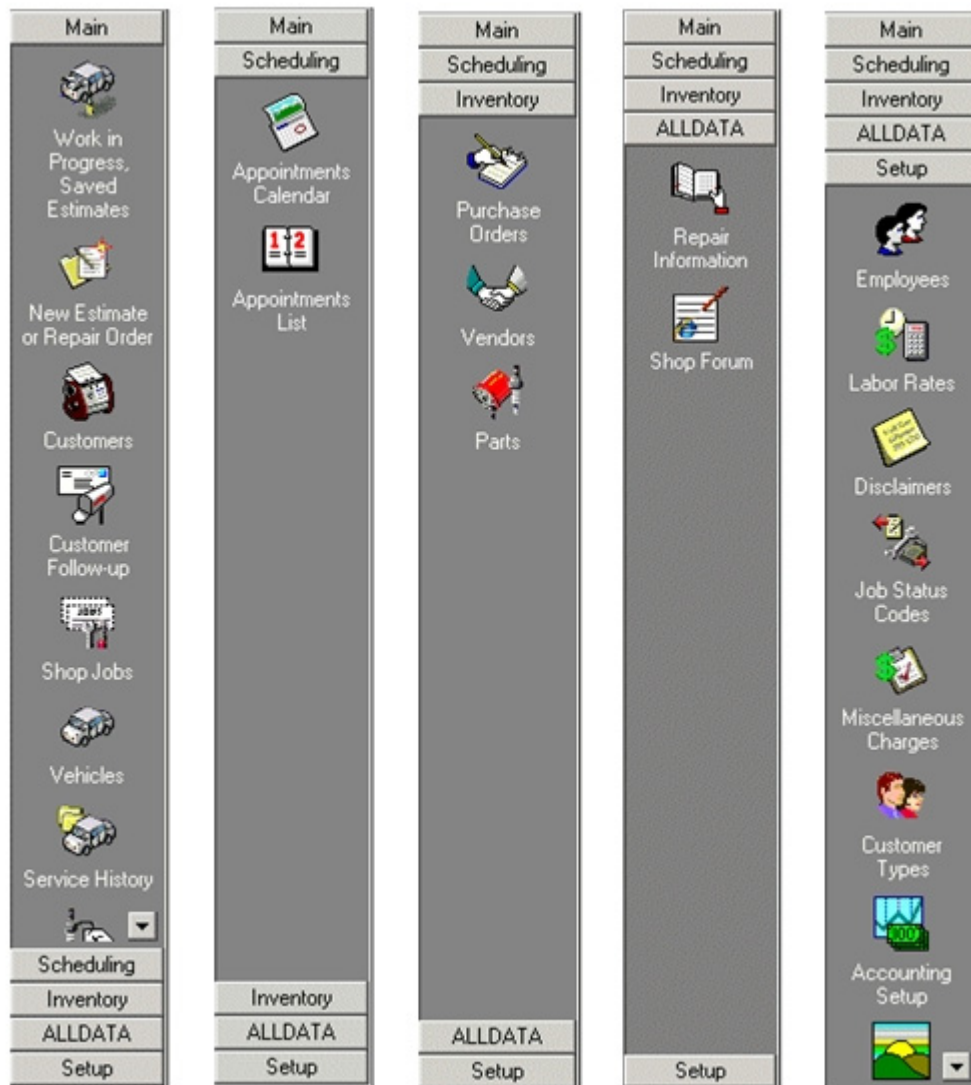
Message help button

This help button is available on most messages you will see. Click the button for help related to the specific message you are viewing.

Chapter 1: Shortcut and Menu Bars

Shortcut Bar

The shortcut bars are displayed on the left side of the MANAGESM application window.



To hide/display the Shortcut Bar:

From the **View** menu, select **Shortcut bar**.

The shortcut bars

When starting MANAGE the main shortcut bar is selected. You can select a shortcut bar by clicking on the shortcut bar name.

Main shortcut bar

The **Main** shortcut bar gives access to day-to-day work options, such as working with customers, vehicles and orders.

Scheduling shortcut bar

The **Scheduling** shortcut bar gives access to appointment information.

Inventory shortcut bar

The **Inventory** shortcut bar gives access to purchase orders, vendors, and the parts list.

ALLDATA shortcut bar

The **ALLDATA** shortcut bar gives access to the ALLDATA library of repair information and to the Shop Forum, an online user community.

Setup shortcut bar

The **Setup** shortcut bar gives access to system Setup options, such as adding employees and creating labor rates.

Menu Bar

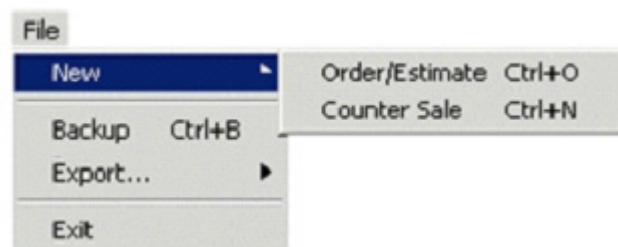
The menu bar presents most of your application options, including creating new orders, setting up shop information, requesting reports, and getting help.



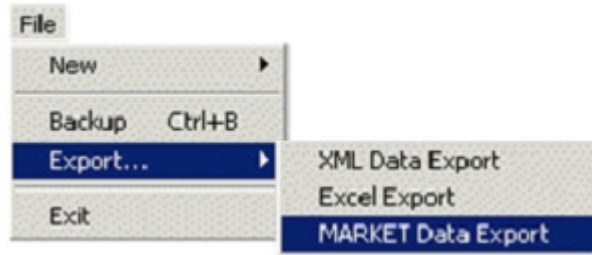
Note: To open a menu within Manage, click it or press the underlined letter while holding down the **ALT** key (i.e. **ALT-F** opens the **File** menu.)

File menu

Use the **File** menu to create new estimates and repair orders, create new counter sales, backup the database.



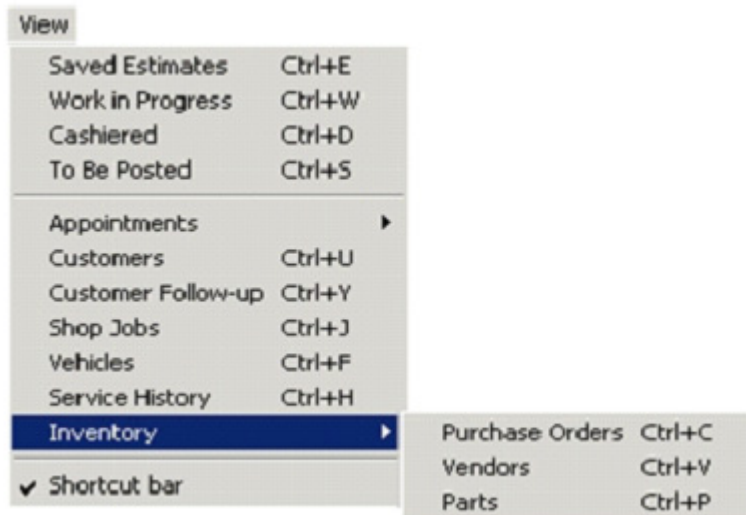
The **File** menu also allows you to export data to an XML file, an Excel file, or the MARKET web site.



View menu

Use the **View** menu to switch the window you are currently viewing (work in progress, estimates, customers, shop jobs, vehicles, service history).

The View menu also allows you to hide or display the shortcut bar.



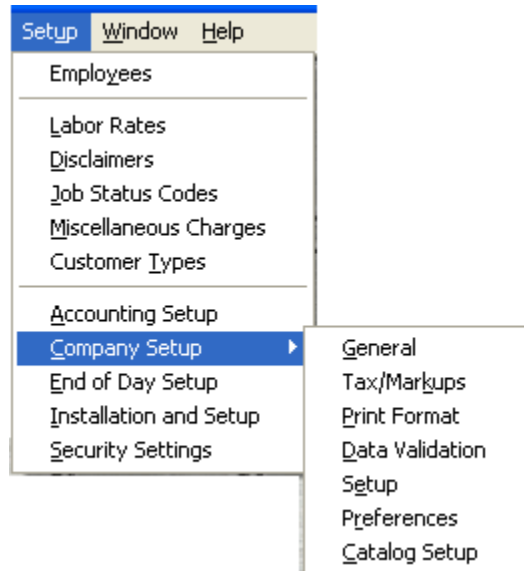
Reports menu

Use the **Reports** menu to access customer, management, shop, and inventory reports.

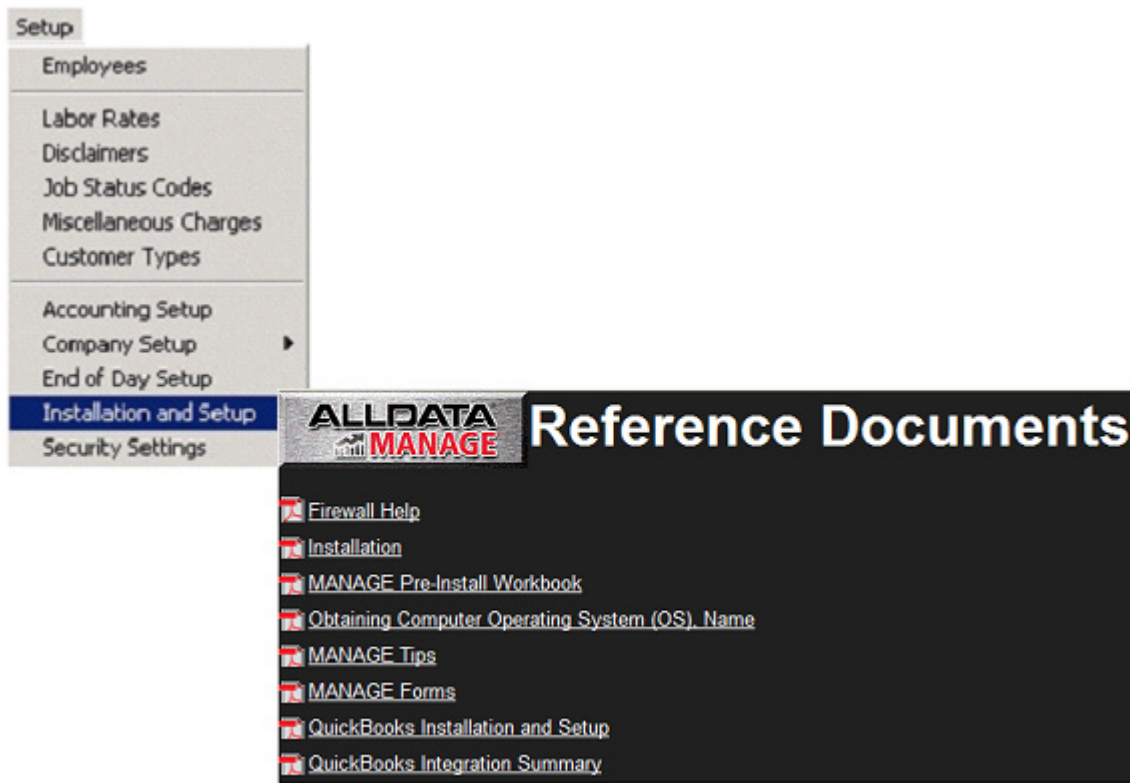


Setup menu

Use the **Setup** menu to access setup windows (for example: accounting integration, database tables, and security profiles).



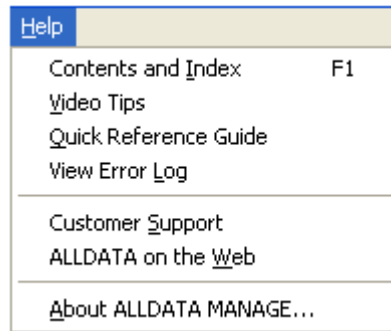
The Setup menu also allows you to view and print installation and setup documentation from a browser.



Help menu

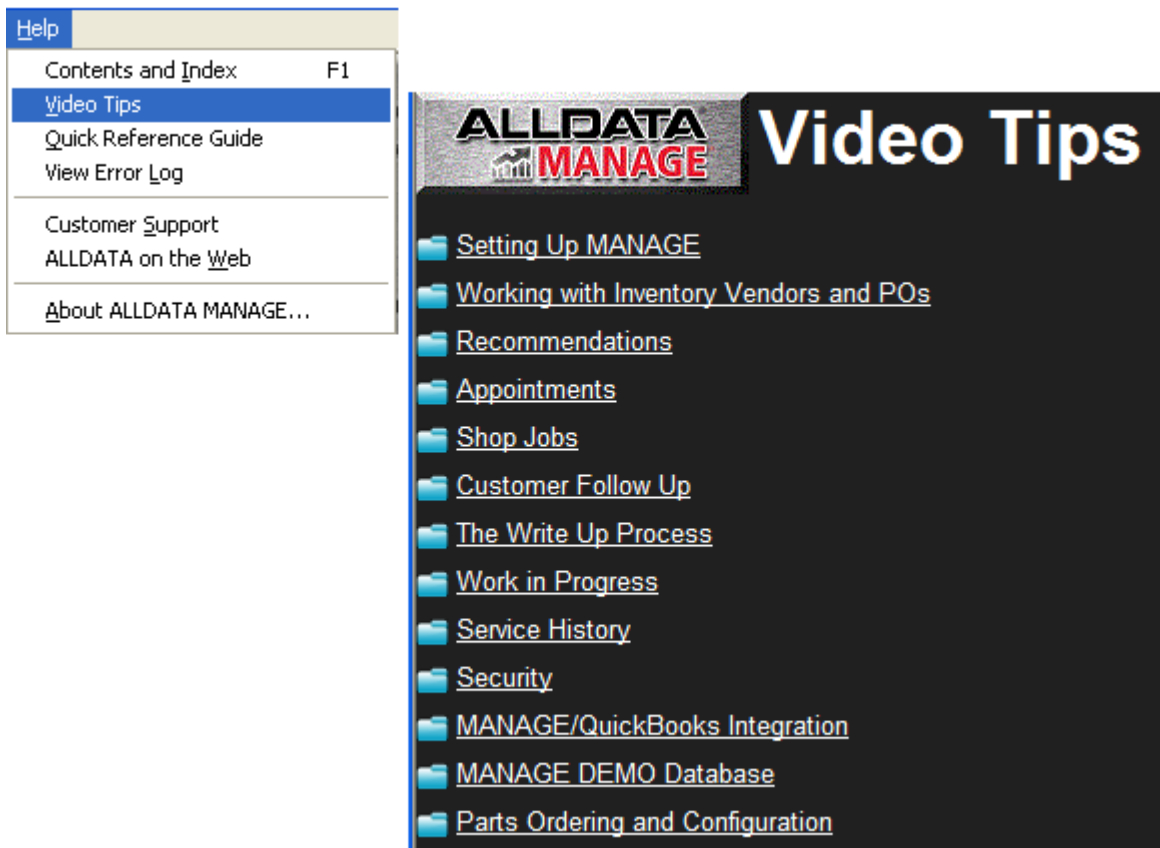
Use the **Help** menu to access the help system, Video Tips, the Quick Reference Guide (Training Manual), view the error log, find customer support contact information, automatically link to the

ALLDATA.com website if you have an active Internet connection, or view legal information.



Video Tips

Use the **Help menu** and select **Video Tips** to access a selection of training videos displayed in a browser.



Chapter 2: Setting Up Your Company Information

You must set up your shop information before you begin using ManageSM. This includes:

- Company information (general information, tax rates, markups, print formats, data validation settings, and setup options), refer to Setting General Company Information below.
- Shop Data Information (employees, labor rates, disclaimers, job status codes, and miscellaneous labor charges, etc.), refer to "Chapter 3: Adding Shop Data" on page 24.

The ALLDATA MANAGE Setup Wizard helps you add basic information before you use Manage the first time. For help with the Setup Wizard refer to the *MANAGE Pre-Install Workbook*, which can be accessed from the Manage menu by choosing **Setup > Installation and Setup > MANAGE Pre-Install Workbook**.

Use this chapter for additional Company Setup instructions and details.

Company Setup

Company information ranges from demographic, such as address and phone numbers, to tax rates, license numbers and database backup options.

To access Company Setup:

From the **Setup** menu or shortcut bar select **Company Setup**.

The Company Setup window contains the following tabs:

- General
- Tax/Markups
- Print Format
- Data Validation
- Setup
- Preferences
- Catalog Setup

Note: Some of the above features are only functional when the subscription includes Elite Features.

MANAGE
File View Reports Setup Window Help

Main
Scheduling
Inventory
ALLDATA
Setup

Employees
Labor Rates
Disclaimers
Job Status Codes
Miscellaneous Charges
Customer Types
Accounting Setup
End of Day Setup
Company Setup

Company Setup

General | Tax/Markup | Print Format | Data Validation | Setup | Preferences | Catalog Setup

Company Name: ACE Automotive

Owner Name: Roy Reagin Phone: (800) 684-6840

Address: 123 4th st Fax:

Email: me@hoops.com

Postal Code: 95758 Shop #: 001

City: Eli Grove State/Prov.: CA

Web Address: myshop@alldata.com

Licenses

1: Smog 123456789

2: BARS87654321

3:

Submit Cancel

Setting General Company Information

Use the **General** tab to enter the basic contact and license information listed below.

1. From the **Setup** menu or shortcut bar, select **Company Setup**.
2. Select the **General** tab.
3. Type your shop's general company information. (See the following descriptions.)

The screenshot shows the 'General' tab of the ALLDATA MANAGE system. The form is titled 'General' and contains the following fields:

- Company Name:** Pete Jones Automotive
- Owner Name:** Pete Jones
- Address:** 555 Main Street
- Postal Code:** 19000-0000
- City:** ANYTOWN
- State/Prov.:** PA
- Phone:** (215) 555-1212
- Fax:** (215) 555-5555
- Email:** peter.jones@alldata.com
- Shop #:** (empty)
- Web Address:** colantonio.procarcarezone.com

Below the main form is a section titled 'Licenses' with three numbered input fields:

- 1: PA State Inspection
- 2: PA I/M
- 3: (empty)

Fields on the General tab:

Company Name: Your shop's name, as you want it to appear on estimates, repair orders and counter sales.

Owner Name: Your shop owner's name. Note: This does not appear on printouts.

Address: Your shop's address.

Postal Code: Your shop's postal code (5-9 alphanumeric characters). Note: Only the first 5 digits are used to determine the City and State/Prov. values.

City: Your shop's city. The City field is prefilled if the code entered in the postal code field is recognized by Manage.

Phone: Your shop's telephone number.

Fax: Your shop's fax number (if you have one).

Email: Your shop's email address, as it should appear on estimates, repair orders and counter sales.

Shop #: Use this field if you have more than one shop location.

State/Prov.: Your shop's state or province. The State/Prov. field is prefilled if the code entered in the postal code field is recognized by Manage.

Web Address: Your shop's Web site address, as it should appear on estimates, repair orders and counter sales.

Licenses: Any shop licenses that should print on estimates, repair orders, invoices and counter sales (BAR, EPA, etc.).

4. Click the **Submit** button.

Setting Taxes, Markups, and Other Charges

Use the **Tax/Markups** tab to enter the markup and tax option listed below.

1. From the **Setup** menu or shortcut bar, select **Company Setup**.
2. Select the **Tax/Markups** tab.
3. Type and select your shop's options. (See the following descriptions).

The screenshot shows the 'Tax/Markups' configuration window. It is organized into five main sections:

- Tax Rates:** Includes a 'Default Tax Schedule' dropdown menu set to 'System Default' and a 'Tax Matrix Setup' button.
- Markups:** Includes 'Sublet %' (0.00) and 'Labor Guide %' (20.00) input fields, and a 'Price Matrix Setup' button.
- Shop Supply Charges:** Includes a 'Type' dropdown set to 'Parts Only', an 'Amount' field (8.00) with radio buttons for currency and percentage, a 'Max. Charge' field (\$39.72), and an 'Apply Tax' checkbox which is checked.
- Hazmat Charges:** Includes a 'Type' dropdown set to 'Parts & Labor', an 'Amount' field (0.00) with radio buttons for currency and percentage, a 'Max. Charge' field (\$0.00), and an 'Apply Tax' checkbox which is unchecked.
- Profit Margins:** Includes a 'Minimum Order Profit Margin %' field set to 54.00.

Tax Rates

Default Tax Schedule: Displays the tax schedule set as a default.

Tax Matrix Setup: Click this button to open the **Tax Rate Setup** window.

On the **Tax Rates** tab:

The screenshot shows the 'Tax Rates Setup' window with the following details:

- Tax Rate Name:** Regular Rate
- Tax Rate Type:** Regular (selected), Compound
- Table:**

Range #	Parts			Labor		
	From Cost	To Cost	Tax %	From Cost	To Cost	Tax %
1	\$0.01	No Limit	7.75	\$0.01	No Limit	7.25
- Buttons:** New, Delete, Save, Close, Delete Range # 1

1. Click **New** to activate the **Tax Rate Name** field for input.
2. Enter a name for the new Tax Rate.
3. Select a Tax Rate Type using the selection boxes:
 - Regular
 - Compound (only one compound tax can be configured per database)
4. Use the grid to add ranges and tax percentages and click **Save**.
5. Click **New** to add more Tax Rates or select the **Tax Schedule** tab.

On the Tax Schedule tab:

Tax Rates Setup

Tax Rates | Tax Schedule

Schedule Name: new schedule

Default Schedule

Tax Rates Available

Tax Rate	Type
new Compound rate	Regular

Tax Rates Included

Tax Rate	Type
Newly created	Regular

Buttons: Add Selected >, < Remove Selected, << Remove All

Bottom Buttons: New, Delete, Save, Close

1. Click **New** to activate the **Schedule Name** field for input.
2. Enter a name for the new Tax Schedule.
3. If appropriate, use the **Default Schedule** box to set the current schedule as the default.
4. Use the buttons: **Add Selected >**, **< Remove Selected**, or **<< Remove All** to move Tax rates between the **Tax Rates Available** and **Tax Rates Included** grids and click **Save**.
5. Click **Close**.
Result: The Tax/Markup tab of the company Setup window displays.

Markups

Sublet %: Type the markup percentage of work you send to other shops.

Labor Guide %: Type the markup percentage for labor items from the ALLDATA Repair Parts and Labor Guide.

Price Matrix Setup: Click this button to open the Price Matrix Setup window, where parts markups and profit margins can be configured. For more information on completing this window refer to "Price Matrix" on page 119.

Shop Supply Charges

Use this section to set up a Shop Supply fee that is automatically added to all jobs on orders. The charge is either a *flat fee* or a *percentage* of the parts and labor charges. The fee can be removed from individual orders.

Note: The Shop Supply fee is applied to each job on an order matching the Parts and Labor criteria selected.

To charge a *flat* shop supply fee:

1. In the Shop Supply Charges **Type** drop-list, select **Parts & Labor**, **Parts Only**, or **Labor Only**.
 - Parts Only - fee only applies when parts are billed to a job
 - Labor Only - fee only applies when labor, sublet or miscellaneous charges are billed to a job
 - Parts & Labor - fee applies when parts, labor, sublet or miscellaneous charges are billed to a job
2. Type the fee amount.
3. Select the dollar sign (\$) after your selection.
4. Select **Apply Tax** if the shop supply fee is taxable. Supplies are a materials charge so are taxed using the parts rate. If your Parts % tax rate is set at zero, then this field is disabled.

The screenshot shows the 'Shop Supply Charges' dialog box. It has the following fields and options:

- Type:** A dropdown menu set to 'Parts & Labor'.
- Amount:** A text input field containing '10.00'. To its right are three radio buttons: the first is unselected, the second (with a '\$' symbol) is selected, and the third (with a '%' symbol) is unselected.
- Max. Charge:** A text input field containing '\$30.00'.
- Apply Tax:** A checkbox that is checked, and the entire label and checkbox are circled in red.

To charge a *percentage* shop supply fee:

1. In the Shop Supply Charges **Type** drop-list, select **Parts & Labor**, **Parts Only**, or **Labor Only**.
 - Parts Only - fee only applies when parts are billed to a job
 - Labor Only - fee only applies when labor, sublet or miscellaneous charges are billed to a job
 - Parts & Labor - fee applies when parts, labor, sublet or miscellaneous charges are billed to a job

2. Type the percentage amount.
3. Select the percentage sign (%) after your selection.
4. Type a **Maximum Charge**. Do not leave this box at zero or the application assumes there is no maximum charge.
5. Select **Apply Tax** if the shop supply fee is taxable. Supplies are a materials charge so are taxed using the parts rate. If your Parts % tax rate is set at zero, then this field is disabled.

Hazmat Charges

Use this section to set up a Hazardous Materials fee that is automatically added to all orders. The charge is either a *flat fee* or a *percentage* of the parts and labor charges. The fee can be removed from individual orders.

To charge a *flat* hazardous materials fee:

1. In the Hazmat Charges **Type** drop-list, select **Parts & Labor**, **Parts Only**, or **Labor Only**.
 - Parts Only - fee only applies when parts are billed to a job
 - Labor Only - fee only applies when labor or miscellaneous charges are billed to a job
 - Parts & Labor - fee applies when parts, labor or miscellaneous charges are billed to a job
2. Type the fee amount.
3. Select the dollar sign (\$) after your selection.

Note: The Hazmat fee is applied to each job on an order matching the Parts and Labor criteria selected.
4. Select **Apply Tax** if the hazmat fee is taxable. Hazmat is a materials handling fee so it is taxed using the labor rate. If your Labor % tax rate is set at zero, then this field is disabled.

The screenshot shows a form titled "Hazmat Charges" with the following fields and options:

- Type: Parts & Labor (selected in a dropdown menu)
- Amount: 10.00 (with radio buttons for \$ and %)
- Max. Charge: \$100.0
- Apply Tax: (circled in red)

To charge a *percentage* hazardous materials fee:

1. In the Hazmat Charges **Type** drop-list, select **Parts & Labor**, **Parts Only**, or **Labor Only**.
 - Parts Only - fee only applies when parts are billed to a job

- Labor Only - fee only applies when labor or miscellaneous charges are billed to a job
 - Parts & Labor - fee applies when parts, labor, or miscellaneous charges are billed to a job
2. Type the percentage amount.
 3. Select the percentage sign (**%**) after your selection.
 4. Type a **Maximum Charge**. Do not leave this box at zero or the application assumes there is no maximum charge.
 5. Select **Apply Tax** if the hazmat fee is taxable. Hazmat is a materials handling fee so is taxed using the labor rate. If your Labor % tax rate is set at zero, then this field is disabled.

Profit Margins

Minimum Order Profit Margin: Type the minimum threshold percentage. This value is used to determine if the profit margin is met as orders are saved. For more information, refer to "Profit Margin Analysis" on page 120.

Note: The Minimum Order Profit Margin feature is only functional when the subscription includes Elite Features.

Setting Print Format

Use the **Print Format** tab to select and enter printing options.

1. From the **Setup** menu or shortcut bar, select **Company Setup**.
2. Select the **Print Format** tab.
3. Type and select your print format options.

Fields on the Print Format tab:

Header: Type text to print at the top of your printed estimates, repair orders, counter sales and balance due reports.

Footer: Type text to print at the bottom of printed estimates, repair orders, counter sales and balance due reports. The footer does not print on pre-printed forms.

Printed Labor Format section

Show Rate and Time: Select this option to show the labor rate, labor time and total billed labor on printed estimates, repair orders and invoices.

Show Total: Select this option to show just the total billed labor amount on printed estimates, repair orders and invoices.

Report Settings

Print on Preprinted Form: Select this option when using pre-printed MANAGESM forms.

Print Technicians: Select this option to print the technician's name on receipts.

Print "Authorized By": Select this option to print the Authorized By fields on the order and order history reports. This option is unavailable if the **Print on Pre-Printed form** option is selected.

Print * for Hazmat and Shop Supplies: Select this box to print an * next to the Hazmat and Shop Supplies charges when they are printed on order reports. This might be required by your local government.

Print Orders with Job Sub Totals: Select this box to include Job Sub Totals when printing orders.

4. Click the **Submit** button.

Setting Data Validation Levels

Use the **Data Validation** tab to select the validation levels for different conditions at various stages of the order. This allows you to tailor Manage to require certain information important to your business under specific circumstances.

1. From the **Setup** menu or shortcut bar, select **Company Setup**.
2. Select the **Data Validation** tab.

Data Validation

Order Data Validation Setup

Order State	Rule	Location	Status
Quote/Est/RO	Mileage In cannot be zero or less than the vehicle's Current Mileage	Order Screen	Not Required
Quote/Est/RO	Mileage Out cannot be zero or less than the Mileage In	Order Screen	Not Required
Quote/Est/RO	Written By cannot be blank	Order Screen	Not Required
Quote/Est/RO	Assigned Technician cannot be blank	Job Screen	Not Required
Invoice	Mileage In cannot be zero or less than the vehicle's Current Mileage	Order Screen	Not Required
Invoice	Mileage Out cannot be zero or less than the Mileage In	Order Screen	Not Required
Invoice	Written By cannot be blank	Order Screen	Not Required
Invoice	Order Total cannot exceed authorized estimate amount	Order Screen	Not Required
Invoice	Assigned Technician cannot be blank	Job Screen	Not Required
Invoice	Part Cost cannot be zero	Line Item Screen	Not Required
Invoice	Labor Flagged Hours cannot be zero	Line Item Screen	Not Required
Invoice	Misc Cost cannot be zero	Line Item Screen	Not Required
Invoice	Sublet Cost cannot be zero	Line Item Screen	Not Required
All	Vehicle License cannot be blank	Vehicle Screen	Not Required
All	Vehicle VIN cannot be blank	Vehicle Screen	Not Required
Customer	Email Cannot be blank	Customer Screen	Not Required

3. Select an Order State/Rule/Location combination and click the **Change Status** button until the appropriate status displays in the Status column.
4. Repeat Step 3 as appropriate.
5. Click the **Submit** button.

Note: The Data Validation feature is only functional when the subscription includes Elite Features.

Setting Setup Information

Use the **Setup** tab to set various options and settings, including estimate and repair order options.

1. From the **Setup** menu or shortcut bar, select **Company Setup**.
2. Select the **Setup** tab.

The screenshot displays the 'Setup' tab interface with the following sections and fields:

- Starting RO #:** 252
- Delete Estimate files after...(days):** 35
- Starting Estimate #:** 259
- Delete PO files after...(days):** [Empty]
- Starting PO #:** 82
- Display warning when posting an invoice if parts cost or labor cost is not entered.
- Display warning when posting an invoice if the invoice is not paid in full.
- Bypass Revision Message
- Shop/Web Settings:** MARKET Shop ID: 139044
- AutoAdmin Settings:**
 - Show AutoAdmin Results on Open
 - Enable AutoAdmin Appointment Import
 - Enable AutoAdmin Service History Export
 - Display New Appointment Message
 - Display AutoAdmin Error Messages
- Catalog Settings:**
 - Enable Automatic Mapping of OEM Parts to AutoZone Parts
 - OEM Catalog Source: Online, Disc
 - AutoZone Catalog Source: AutoZone Online, Activant Disc
- Job Categories:**

Category	System
Accessories and Optional Equipment	<input checked="" type="checkbox"/>
Body and Frame	<input checked="" type="checkbox"/>
Brakes and Traction Control	<input checked="" type="checkbox"/>
Cruise Control	<input checked="" type="checkbox"/>
Diagnosis	<input type="checkbox"/>
Engine, Cooling and Exhaust	<input checked="" type="checkbox"/>
Heating and Air Conditioning	<input checked="" type="checkbox"/>
Instrument Panel, Gauges and Warning Indicators	<input checked="" type="checkbox"/>
Lighting and Horns	<input checked="" type="checkbox"/>
Maintenance	<input checked="" type="checkbox"/>
Powertrain Management	<input checked="" type="checkbox"/>
Relays and Modules	<input checked="" type="checkbox"/>
Restraint Systems	<input checked="" type="checkbox"/>
Sensors and Switches	<input checked="" type="checkbox"/>
Starting and Charging	<input checked="" type="checkbox"/>
Steering and Suspension	<input checked="" type="checkbox"/>
Transmission and Drivetrain	<input checked="" type="checkbox"/>
Wipers and Glass	<input checked="" type="checkbox"/>
- New Category:** [Empty]
- Buttons: Add, Edit, Delete

3. Type and select your available settings and options.

Starting RO#: Type the number you want repair orders to begin at.

Starting Estimate #: Type the number you want estimates to begin at.

Starting PO#: Type the number you want purchase orders to begin at.

Delete estimate files after...(days): The number of days to keep your estimates.

Delete PO files after...(days): The number of days to keep your closed or voided purchase orders.

Display warning when posting an invoice if parts cost or labor cost is not entered: Select this option if you want to be warned, at the time of posting, that you have not entered your actuals (the actual labor time spent or the actual part or service cost).

Display warning when posting an invoice if the invoice is not paid in full: Select this option if you want to be warned, at the time of posting, when an invoice still has a balance due.

Bypass Revision message: Select this option to turn off the warning message when revisions are not authorized before saving the order.

4. Complete the **ShopWeb Settings** section:
MARKET Shop ID: Enter your MARKET Shop ID number. This field is required if Customer Follow-up uses the MARKET Email format and is enabled.
5. Complete the **AutoAdmin Setting** Section:
Backup button: Use this button to set your automatic backup options.
Export button: Use this button to set your export scheduling options.
Show AutoAdmin Results on Open: Select this option to display, at startup, the results of any backups or exports completed since shutdown.
Enable AutoAdmin Appointment Import: Select this option to activate the importing of appointments from the MARKET web site every hour.
Enable AutoAdmin Service History Export: Select this option to activate the exporting of service history information to the MARKET web site every hour.
Display New Appointment Message: Select this option to have a notification message display when a new appointment is found and imported.
Note: This field is deactivated when the MARKET Shop ID field is blank or the **Enable AutoAdmin Appointment Import** option is disabled.
Display AutoAdmin Error Message: Select this option to have error messages display when AutoAdmin encounters an error while importing appointments or exporting Service History information.
Note: This field is deactivated when the MARKET Shop ID field is blank or when no related AutoAdmin option is enabled.
6. Complete the **Catalog Settings** section:
Enable Automatic Mapping of OEM Parts to AutoZone Parts: Select this option to turn on the automatic lookup of AutoZone Parts from the Catalog window.
OEM Catalog Source: Select if you will access the OEM Parts from Online or Disc
AutoZone Parts Source: Select if you will access the Activant Disc Catalog or the AutoZone Online Catalog. Note: Online access requires an Internet connection.
7. In the **Job Categories** section, the system defaults are listed and cannot be changed. To add a category, type the name of an additional category in the **New Category** field and click **Add**.
Result: The category is added to the list and can be changed or deleted.
8. Click **Submit**.

Note: The New Category field is only functional when the subscription includes Elite Features.

Setting Preferences

Use the **Preferences** tab to select and enter your shop preferences options.

Note: The Preference tab is only functional when the subscription includes Elite Features.

1. From the **Setup** menu or shortcut bar, select **Company Setup**.
2. Select the **Preferences** tab.

The screenshot displays the 'Preferences' tab interface. It is divided into three main sections:

- Default Search by Settings:** A dropdown menu labeled 'Part Screen Search' is currently set to 'Part Number'.
- Default City Casing Settings:** A dropdown menu labeled 'City Casing' is currently set to 'Title Case'.
- Default Follow-up Format:** A dropdown menu labeled 'Follow-up Format' is currently set to 'MANAGE Mail Merg.'.

3. In the **Default Search By Settings** section, choose the Part Screen Search option for the parts screen list:

- Part Number
- Description

4. In the **Default City Casing Settings** section, select the type of capitalization to use when pre-filling city fields on company, customer, and vendor windows.

If you select UPPER CASE, all prefilled city names will be completely capitalized (ATLANTIC CITY) and if you select Title Case, all prefilled city names will be capitalized as a Title (Atlantic City).

5. In the **Default Follow-up Format** section, select the Follow-up Format to use as a default.

6. Click the **Submit** button.

Note: The Default Follow-up Format is only functional when the subscription includes Elite Features.

Catalog Setup

Use the **Catalog Setup** tab to select and enter your Catalog Credentials.

1. From the **Setup** menu or shortcut bar, select **Company Setup**.
2. Select the **Catalog Setup** tab.

The screenshot shows the 'Company Setup' window with the 'Catalog Setup' tab selected. The window has a sidebar with several expandable sections, each containing input fields for credentials and a button for 'Update Password and MCL'.

- AutoZone**: Pin (text field), Update Password and MCL (button)
- Internet Auto Parts**: PartnerCompany (text field), UserName (text field), Password (text field), ProgramGroup (text field), StoreID (text field)
- Autoi Online**: UserName (text field), Password (text field)
- WHI Solutions**: Username (text field), Password (text field)
- OEM**: Username (text field), Password (text field)

3. Enter info and Credentials for the relevant Catalogs.
4. When credentials are entered for a catalog that catalogs Tab will appear in the catalog viewer.
5. Enter your ALLDATA Repair online username and password for OEM Catalog, Parts & Labor.
6. When AutoZone PIN is entered click "Update Password and MCL" to complete AutoZone setup.
7. If Activant discs are copied to the PC and the license is activated, Click "AConneX Setup" to "Retrieve AConneX Account" info or "Create New AConneX Account".

Note: The Credentials need for each catalog will be available from your Parts Vendor.

Chapter 3: Adding Shop Data

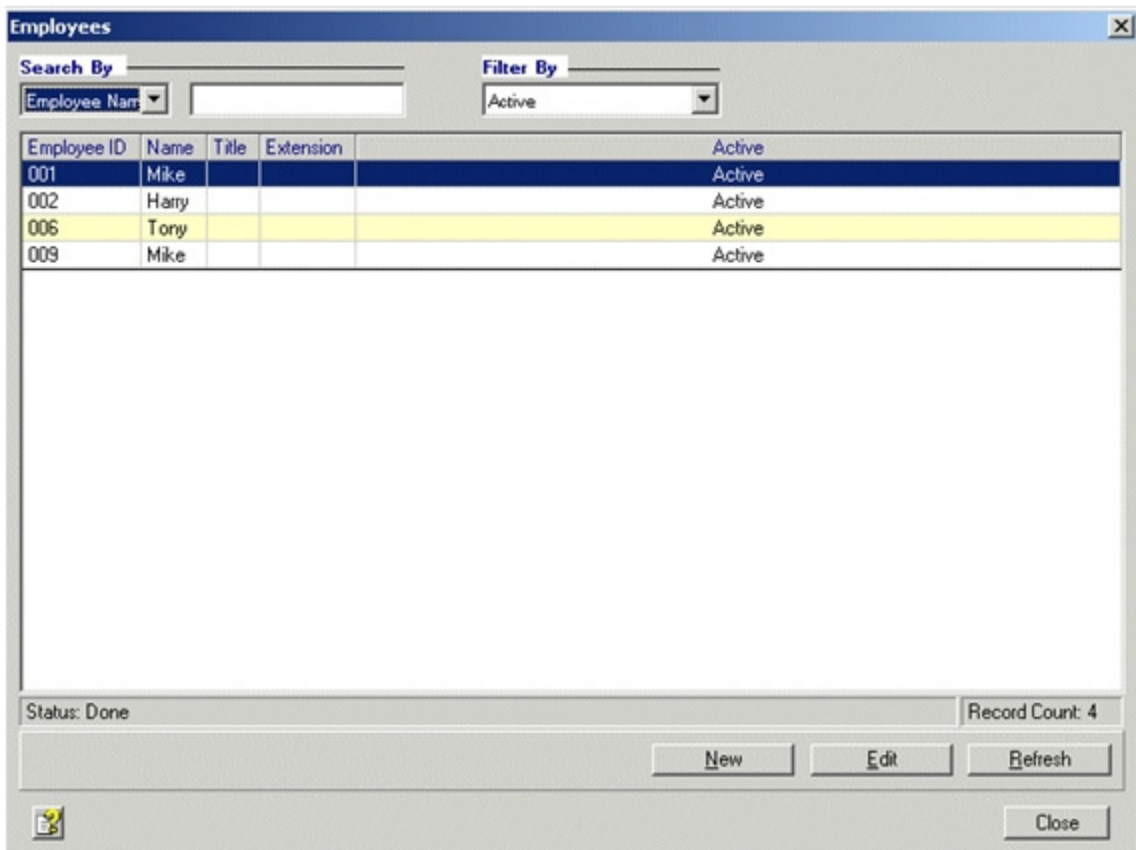
Creating Employee Records

To list the names of employees on estimates, repair orders, counter sales and reports, you must add their names to the system.

To add an employee:

1. From the **Setup** menu or shortcut bar, select **Employees**.

Result: A list of employees is displayed.



The screenshot shows a window titled "Employees" with a search and filter interface. The "Search By" dropdown is set to "Employee Name" and the "Filter By" dropdown is set to "Active". The table below displays the following data:

Employee ID	Name	Title	Extension	Active
001	Mike			Active
002	Harry			Active
006	Tony			Active
009	Mike			Active

At the bottom of the window, the status is "Done" and the record count is "4". There are buttons for "New", "Edit", "Refresh", and "Close".

- Click the **New** button.

Result: A **New Employee** dialog box is displayed.

- Type an **Employee ID**. Choose how you want to identify your employees using letters, numbers or both. This is a required field.
- Type an **Employee Name** (required), **Title** and **Extension**.
- Enter **Salary Information** (Not required.)
 - Flat Rate - In the **Payment Type** drop-list, select **Flat Rate** for hourly employees whose hours are calculated using the hours billed to the customer rather than the actual hours worked. Type the hourly pay rate in the **Payment Amount** field.
 - Hourly - In the **Payment Type** drop-list, select **Hourly** for employees paid per hour worked. Type the hourly pay rate in the **Payment Amount** field.
 - Salary - In the **Payment Type** drop-list, select **Salary** for employees paid a set amount for a set time period. Type the salary amount in the **Payment Amount** field, and type the hours per pay period in the **Pay Period Hours** field.
- Select the **Roles** the employee performs. This is a required field.
- Select **Active** if the employee is available to be assigned to Jobs. (Not required.)
- Click the **Submit** button.

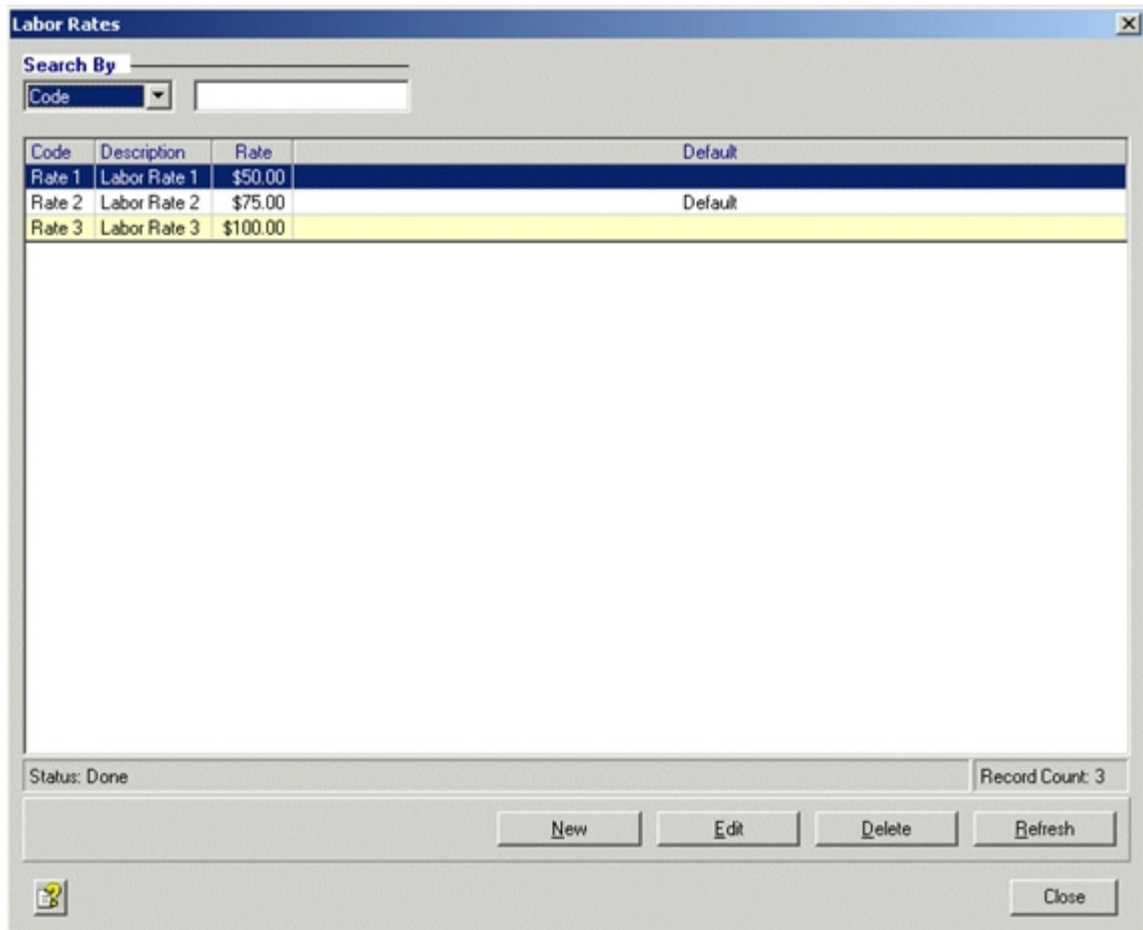
Creating Labor Rates

You must create the labor rates that are available when creating estimates and repair orders. After creating your labor rates, verify that one is selected as the default rate.

To create a labor rate:

1. From the **Setup** menu or shortcut bar, select **Labor Rates**.

Result: A list of labor rates is displayed.



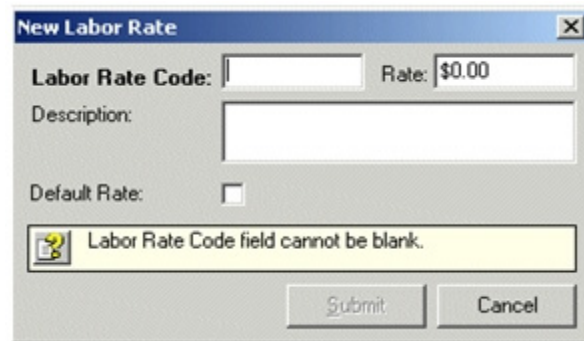
The screenshot shows a window titled "Labor Rates" with a search bar and a table of labor rates. The table has four columns: Code, Description, Rate, and Default. The data is as follows:

Code	Description	Rate	Default
Rate 1	Labor Rate 1	\$50.00	
Rate 2	Labor Rate 2	\$75.00	Default
Rate 3	Labor Rate 3	\$100.00	

Below the table, the status is "Done" and the record count is "3". At the bottom, there are buttons for "New", "Edit", "Delete", "Refresh", and "Close".

2. Click the **New** button.

Result: A **New Labor Rate** dialog box is displayed.



The screenshot shows a dialog box titled "New Labor Rate". It has a close button in the top right corner. The dialog contains the following fields and controls:

- Labor Rate Code:** An empty text input field.
- Rate:** A text input field containing "\$0.00".
- Description:** A larger empty text input field.
- Default Rate:** A checkbox that is currently unchecked.
- Error Message:** A yellow box with a warning icon and the text "Labor Rate Code field cannot be blank." is displayed below the input fields.
- Buttons:** "Submit" and "Cancel" buttons are located at the bottom right of the dialog.

3. Type a **Labor Rate Code**. Choose how you want to identify your labor rates using letters, numbers or both. This is a required field.
4. Type a **Rate**.
5. Type a **Description**.
6. Select the **Default Rate** check box if you want this rate to be your default labor rate.
7. Click the **Submit** button.

Creating Disclaimers

ManageSM provides a method for creating and printing certain notes, warnings, disclaimers or waivers that might be required by your local government.

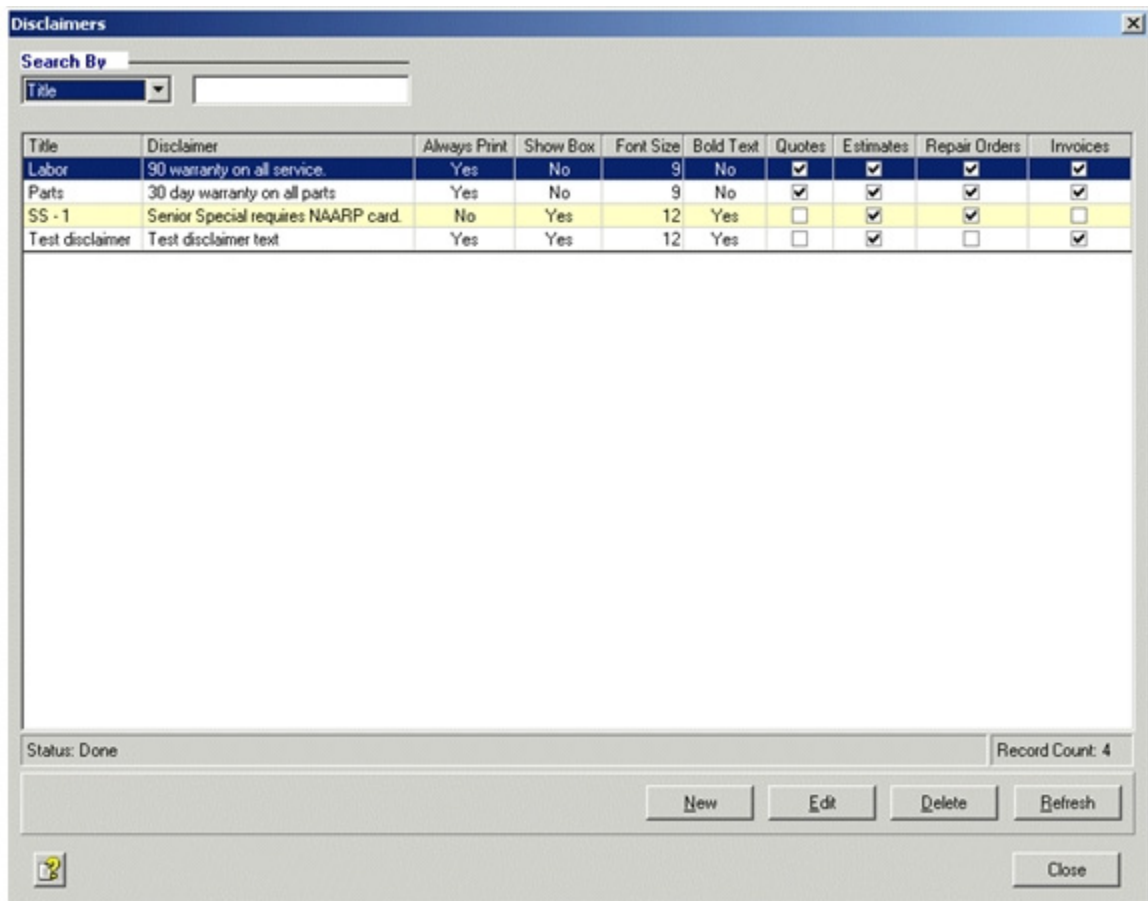
You can configure the font, style, and conditions for printing.

You must create the disclaimers before they can be available while creating estimates and repair orders.

To create a disclaimer:

1. From the **Setup** menu or shortcut bar, select **Disclaimers**.

Result: A list of disclaimers is displayed. The list is blank if no disclaimers have been created.



2. Click the **New** button.

Result: A **New Disclaimer** dialog box is displayed.

The screenshot shows the 'New Disclaimer' dialog box. It features a title bar with the text 'New Disclaimer' and a close button. The main area contains a 'Title:' label followed by an empty text input field. Below this is a 'Disclaimer' label followed by a large, empty text area for entering the disclaimer text. At the bottom of the dialog, there are two sections: 'Settings' and 'Prints On'. The 'Settings' section includes checkboxes for 'Always Print' (checked), 'Show Box' (unchecked), and 'Bold Text' (unchecked), along with a 'Font Size' dropdown menu set to '9'. The 'Prints On' section includes checkboxes for 'Quotes' (checked), 'Estimates' (checked), 'Repair Orders' (checked), 'Invoices' (checked), and 'All' (checked). At the very bottom, there is a yellow warning box with a speech bubble icon and the text 'Title field cannot be blank.', and two buttons: 'Submit' and 'Cancel'.

3. Type a **Title** to identify your disclaimers. Use letters, numbers or both. This is a required field.
4. Type your **Disclaimer** text. You can use both letters and numbers in this field.
5. Select the appropriate **Settings**:
 - Always Print
 - Show Box
 - Bold Text
 - Font Size
6. Select the **Prints On** options:
 - Quotes
 - Estimates

- Repair Orders
- Invoice
- All

7. Click the **Submit** button.

Creating Job Status Codes

Use job status to indicate the *state* of service or repair.

You must create the job status codes that are available when creating estimates and repair orders.

To create a job status code:

1. From the **Setup** menu or shortcut bar, select **Job Status Codes**.

Result: A list of job status codes is displayed. The list initially has a few predefined job status codes that you can use, edit, or delete.

Code	Description
AUTH	Waiting for customer authorization
CHK	To Be Checked
DONE	Job is Complete
PAID	Customer has Paid
PARTS	Holding on Parts
SHOP	In Shop
SOP	Special Order Part
SUBLT	Vehicle out of shop for sublet work.
UN	Unassigned
WAIT	Customer Waiting
WIP	Work in Progress

Status: Done Record Count: 11

Examples: *WIP* is a code with a description of Work in Progress; *PARTS* is a code for Holding on Parts.

2. Click the **New** button.

Result: A **New Job Status Code** dialog box is displayed.



The image shows a dialog box titled "New Job Status Code". It has a blue title bar with a close button (X). The dialog contains two text input fields: "Code:" and "Description:". Below the "Code:" field, there is a yellow error message box with a question mark icon and the text "Status Code field cannot be blank.". At the bottom of the dialog are two buttons: "Submit" and "Cancel".

3. Type a **Code**. Choose how you want to identify your job status codes using letters, numbers or both. This is a required field.
4. Type a **Description**.
5. Click **Submit**.

Creating Miscellaneous Charges

Use miscellaneous charges for simple labor charges.

Note: Miscellaneous charges should not be used for parts because miscellaneous charges are taxed as labor.

You must create the miscellaneous charges that are available when creating estimates and repair orders.

To create a miscellaneous charge:

1. From the **Setup** menu or shortcut bar, select **Miscellaneous Charges**.

Result: A list of miscellaneous charges is displayed. The list is blank if no miscellaneous charges have been created.

The screenshot shows a window titled "Miscellaneous Charges" with a search bar and a table of charges. The table has three columns: Code, Description, and Retail. The data is as follows:

Code	Description	Retail
CHANGE	Change a flat tire.	\$5.00
CHARGE	Battery re-charge.	\$10.00
PLUG	Flat tire plug & fix.	\$25.00

Below the table, the status bar shows "Status: Done" and "Record Count: 3". At the bottom, there are buttons for "New", "Edit", "Delete", "Refresh", and "Close".

2. Click the **New** button.

Result: A **New Miscellaneous Charge** dialog box is displayed.

3. Type a **Code**. Choose how you want to identify your miscellaneous charges using letters, numbers or both. This is a required field.
4. Type a **Retail** charge.
5. Type a **Description**.
6. Select whether to **Tax as Labor** or to leave as **Tax Exempt**.
7. Click the **Submit** button.

Examples of Miscellaneous Charges

The following are examples only, not suggestions.

Code	Description	Cost
NCI	New customer initiation fee	\$25.00
TRAN1	One way shuttle transportation	\$5.00
TRAN2	Round-trip shuttle transportation	\$5.00
Tow	Towing charge	\$50.00
HDLT	Headlight adjustment	\$25.00
Store	Storage fee, per day	\$20.00

Creating Customer Types

Use customer types to automatically assign labor rates, tax exemptions and part discounts to different types or groups of customers.

You must create the customer types that are available when creating or editing customers.

System Default Customer Type

All customers are automatically assigned the *System Default* customer type, but you can assign any customer type to a customer. The System Default starts out with your default labor rate, no parts discount and no tax exemptions, but you can edit these settings. The System Default customer type cannot be deleted.

Example Customer Types: Standard Customer, Senior Citizen, Fleet Customer, Government.

To create a customer type:

1. From the **Setup** menu or shortcut bar, select **Customer Types**.

Result: A list of customer types is displayed.

The screenshot shows a window titled "Customer Types" with a search bar and a table. The table has the following data:

Customer Type	Part Discount	Labor Code	Labor Rate Description	Labor Rate	Tax
Discount	20.00%	Discount	Discount Labor Rate	\$75.00	Parts Labor
System Default	0.00%	Standard	Standard Labor Rate	\$100.00	Parts Labor
Tax Exempt	0.00%	Standard	Standard Labor Rate	\$100.00	

At the bottom of the window, there is a status bar showing "Status: Done" and "Record Count: 3". Below the status bar are buttons for "New", "Edit", "Delete", "Refresh", and "Close".

- Click the **New** button.

Result: A **New Customer Type** dialog box is displayed.

- In the Customer Type Information section, type a **Customer Type**. Use descriptive text or a code that is easy to identify, such as Standard (STD), Preferred, Senior, or Government (GOVT). This is a required field.
- Type a **Part Discount %** if this customer type gets a discount on parts.
- Select **Labor Tax Exempt** or **Parts Tax Exempt** options if this is a tax-exempt customer type.
- In the Labor Rate Information section, select a labor rate code from the **Rate Code** drop-list. The **Rate Code** drop-list contains the labor rates you created.
Result: The **Description** field displays the description and the **Rate** field displays the hourly fee for the selected Rate Code.
- Click the **Submit** button.

Creating and Processing Customer Follow-up Messages

Use the Customer Follow-up feature, when enabled, to manage follow-up messages. Messages (user-created or system) can be tailored, printed and sent (mailed or transmitted via email) to your customers under specific conditions, such as posting invoices or service specials.

Manage system messages are intended to welcome customers, thank them for business, and remind them of scheduled and recommended services. These messages cannot be deleted but can be tailored to meet your shop's specific needs.

User-created messages can be created and tailored using one of two formats:

- **MANAGE Mail Merge**

Using Microsoft Word's Mail Merge functions that are supplied with Manage, these messages can be formatted, labeled, and printed. The printed documents can then be mailed out to your customers.

Note: Microsoft Word is required to be installed on your computer with Authentication certifications applied for macros before certain functions can be accessed. The buttons for functions that require Microsoft Word appear grayed-out when they are not available.

- **MARKET Email**

Using email templates supplied with MARKET and accessed in Manage, these messages can be formatted and sent in email to your customers. All email messages use the information at the MARKET website to process the information. If a valid MARKET Shop ID is not configured in the company setup window, you will not be able to select MARKET email as a format. The template on the MARKET website cannot be edited from within Manage.

The MARKET website queues email message as they are processed in Manage and sends them out to customers in batches. Refer to the MARKET website for information about reports, preferences, and settings.

To access and process follow-up messages:

1. From the main shortcut bar, select **Customer Follow-up**.

Result: The Customer Follow-up window displays with the following tabs:

- **Customer Message Queue** tab - For more information, refer to "Customer Message Queue Tab" on page 37.
- **Processed Messages** tab - For more information, refer to "Processed Messages Tab" on page 39.
- **Settings** tab - For more information, refer to "Settings Tab" on page 40, and setting purge and queue parameters.

Customer Message Queue Tab

The Customer Message Queue tab displays the queued Customer Follow-up Messages that match the Selection Criteria, so that you can locate messages to process or delete.

The screenshot shows a software window titled "Customer Follow-up" with a tabbed interface. The active tab is "Customer Message Queue". Below the tabs are "Selection Criteria" fields: "Message To Process" (a dropdown menu with "Select Message" selected), "Date From" (a date dropdown with "08/15/2008"), "Date To" (a date dropdown with "11/13/2008"), and "Filter By" (a dropdown menu with "All" selected). A "Fetch" button is located to the right of these fields. Below the criteria is a "Select All" button. A table with the following columns is displayed: Process, Customer, Contact, Address 1, Address 2, City, State & Postal Code, Vehicle, Due Date, Subject, and Format. The table is currently empty. At the bottom of the window, there is a status bar showing "Status: Done", "Total Record Count: 0", and "Selected Record Count: 0". Below the status bar are radio buttons for "Letters and Mailing Labels - (11" x 2 5/8" laser or inkjet)" (selected) and "Letters Only". To the right of these are buttons for "Preview", "Process", "Delete", and "Refresh". A "Close" button is located in the bottom right corner.

To determine the queued messages to display:

1. You must select a message type in the to **Message to Process** field.
2. You can use the Date fields to select the earliest and latest due date to be included in the **Date From** and **Date To** drop-down boxes.
3. You can use the **Filter By** option to select a message format (MARKET Email, MANAGE Mail Merge or All) to include in the list.
4. Click **Fetch**.
Result: The **Queued Message** grid is updated to list only those matching the Selection Criteria.

To process queued messages:

1. To preview the layout of a MARKET Email message, highlight a single Customer Follow-up message with the MARKET Email format (mail merge formatted messages cannot be previewed) in the grid and click **Preview**.

Result: A browser type window displays an example of the email the customer will receive. Click **Close** to continue.

2. Using the **Process** selection boxes, select the Customer Follow-up messages that you want to work with.
3. Select a print option to apply to the selected messages.
4. Click **Process** to process the selected messages in the selected print format.

Result:

- **MARKET Email** - If the format of any selected message is MARKET Email, the customer follow-up information for all of the Market Email messages are sent to the MARKET database so that they can be compiled and the email messages sent to the customers.
 - **Manage Mail Merge** - If the format of all the selected messages are MANAGE Mail Merge, the messages open in Microsoft Word to allow you to print the messages and mailing labels.
Note: If Microsoft Word is not installed on your computer, functions that require Microsoft Word will be deactivated.
 - **Both** - If messages of both type are selected only the MARKET Email messages will be processed.
5. When you return to the **Customer Message Queue** tab, the processed messages are moved from the Customer Message Queue to the Processed Messages list, click **Close**.

TIP:

The MARKET website maintains a Customer Follow-up Email Status report. This report shows all of the email files sent to customers, and whether they were successfully delivered.

Processed Messages Tab

The Processed Messages tab displays the message that have been processed so that you can choose messages to view or delete.

Note: A Customer Follow-up Email Status report is available on the Resource Center page of the MARKET website where you can trace follow-up messages of the format MARKET Email.

The screenshot shows a software window titled "Customer Follow-up" with three tabs: "Customer Message Queue", "Processed Messages" (selected), and "Settings". Below the tabs is a "Selection Criteria" section with two dropdown menus: "Message To View" (set to "Show All") and "Search By" (set to "Customer"). A search text box is also present. Below this is a table with the following data:

Customer	Vehicle	Message	Subject	Date Processed	Format
blu zoo	N/A	MANAGE Welcome Letter	Customer Appreciation	8/11/2008 2:46:09 PM	MARKET Email

At the bottom of the window, there is a status bar showing "Status: Done" and "Total Record Count: 1". There are also "Delete" and "Refresh" buttons, and a "Close" button at the bottom right.

To select and process queued messages:

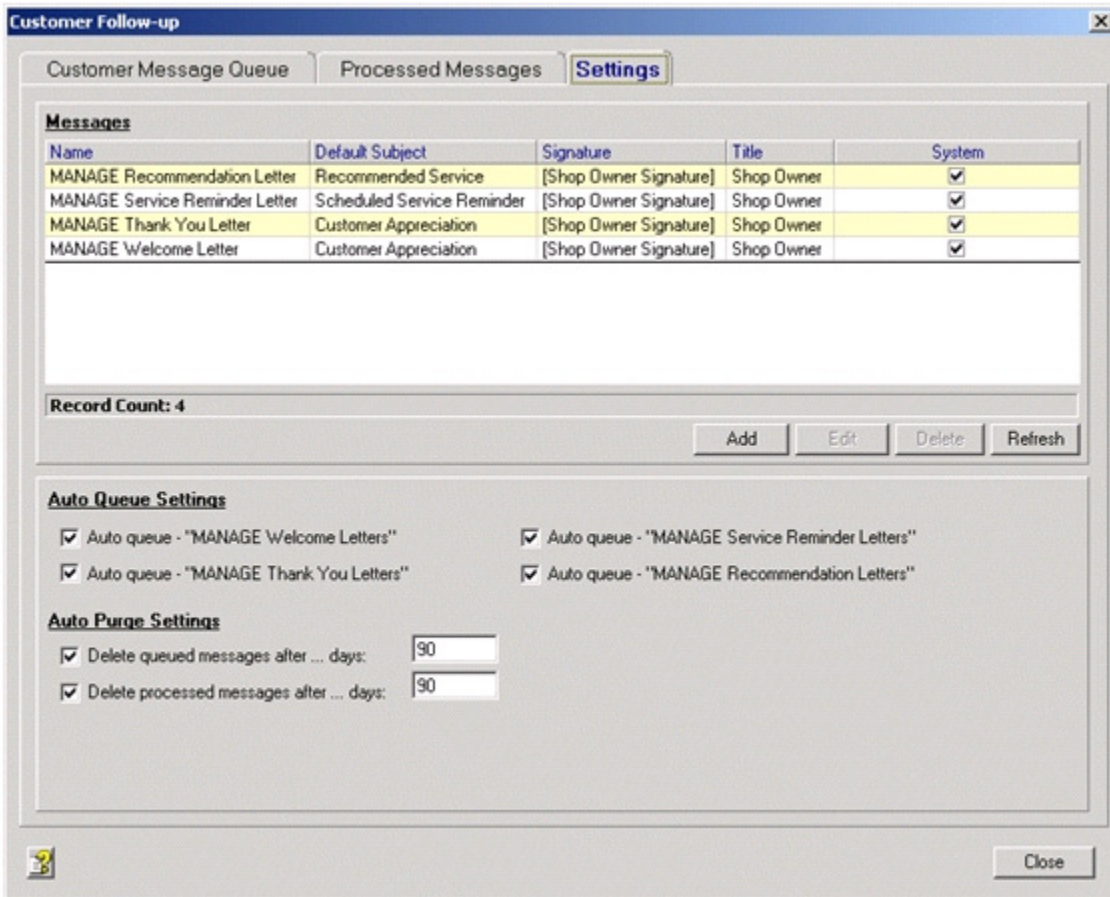
1. Enter the **Selection Criteria**.
 - Select the message type in the to **Message to View** field.
 - In the **Search By** drop-list, select the Search Criteria and type an alphanumeric character in the search by text box.

Result: The Processed Message grid is updated to list only those matching the Selection Criteria.

2. To delete the message before the auto purge date, select a message and click **Delete**.
3. When you are done with the Customer Message Processed Messages tab, click **Close**.

Settings Tab

The Setting tab displays the existing messages and the settings for queuing and purging messages.



To select and process messages and queue settings:

- Select a message and use the following to perform the corresponding functions:
 - Add - To add messages. Refer to "To create a Customer Follow-up Message form:" on page 41 for more information.
 - Edit - To edit existing messages. Refer to "To edit a Customer Follow-up Message form:" on page 42 for more information.
 - Delete - To delete existing, non-system messages.
- In the Auto Queue Settings section, select or de-select the following queue options to enable or disabled them:

Auto queue – MANAGE Welcome Letters	Welcome letters can be automatically queued to be sent to new customers when the Customer record is created.
-------------------------------------	--

Auto queue – MANAGE Thank You Letters	Thank You letters can be automatically queued to be sent to a customer when the customer has an invoice posted.
Auto queue – MANAGE Service Reminder Letters	Reminder letters can be automatically queued to be sent to a customer when the customer has an invoice posted.
Auto queue - MANAGE Recommendation Letters	Recommendation letters can be automatically queued to be sent to a customer when the customer has a Recommendation created.

3. In the Auto Purge Settings section, select or de-select the following queue options to enable or disabled them:

Delete queued message after ___ days.	Enter the desired number of days between queuing the message and deleting it.
Delete processed message after ___ days.	Enter the desired number of days between processing the message and deleting it.

4. When you are done with the Customer Message Settings tab, click **Close**.

Customer Follow-up Message Forms

To create a Customer Follow-up Message form:

1. From the **Main** Shortcut bar, select **Customer Follow-up**.
Result: A list of customer follow-up messages displays.
2. Select the **Settings** tab.
Result: The **Settings** tab displays a list of existing messages. The list includes default System messages supplied with Manage.
3. Click **Add**.
Result: The **New Follow-up Message** window displays.
4. Complete the following fields:
 - **Message Name** - Enter a name for the message. This name will be used as selection criteria on the Customer Message Queue and Processed Messages tabs.
 - **Default Subject** - Enter the text to be displayed in the Subject line of the message.
 - **Paragraph One** - Enter the text to be displayed in the first paragraph of the message. This paragraph is required.
 - **Paragraph Two** - Enter the text to be displayed in the second paragraph of the message. This paragraph is optional.
 - **Paragraph Three** - Enter the text to be displayed in the third paragraph of the message. This paragraph is optional.
 - **Closing** - Enter the text to be displayed in the Closing line of the message.
 - **Signature** - Enter the text to be displayed in the Signature line of the message.

- **Title** - Enter the business title text to be displayed after the Signature line of the message.
5. Determine the number of days to use to calculate the Due Date value and enter the number of days into the **Default Due Date Calculation Settings** field. In the case of the default letters, Scheduled Service Reminder and Recommended Service, this value is only used when the Due Date cannot be calculated automatically.
 6. If you want to apply a template to the form or remove a template that you already applied use the one of the following buttons:
 - Add Template
 - Remove Template

Note: If Microsoft Word is not installed on your computer, functions that require Microsoft Word, like **Process**, will be deactivated.
 7. Click **Submit**.

To edit a Customer Follow-up Message form:



Caution: When using MARKET Email formatted messages, remember that the messages use a template stored on the MARKET website. The templates cannot be edited from MANAGE. If you edit the message text in a way that interferes with the template or its embedded fields, the information may not be accessible.

1. From the Main Shortcut bar, select **Customer Follow-up**.
Result: A list of customer follow-up messages displays. The list has the default message forms even if you have not entered any follow-up message forms.
2. Select the **Settings** tab.
Result: The **Settings** tab displays with the list of existing customer follow-up message forms displayed.
3. Highlight the customer follow-up message form that you want to edit and click **Edit**.
Result: The **Edit Follow-up Message** window displays.
4. Type your changes directly to the fields:
 - **Message Name** - Enter a name for the message. This name will be used as selection criteria on the Customer Message Queue and Processed Messages tabs.
 - **Default Subject** - Enter the text to be displayed in the Subject line of the message.
 - **Paragraph One** - Enter the text to be displayed in the first paragraph of the message. This paragraph is required.
 - **Paragraph Two** - Enter the text to be displayed in the second paragraph of the message. This paragraph is optional.
 - **Paragraph Three** - Enter the text to be displayed in the third paragraph of the message. This paragraph is optional.

- **Closing** - Enter the text to be displayed in the Closing line of the message.
 - **Signature** - Enter the text to be displayed in the Signature line of the message.
 - **Title** - Enter the business title text to be displayed after the Signature line of the message.
5. Determine the number of days to use to calculate the Due Date value and enter the number of days into the **Default Due Date Calculation Settings** field. In the case of the default letters, Scheduled Service Reminder and Recommended Service, this value is only used when the Due Date cannot be calculated automatically.
 6. If you want to apply a template to the form or remove a template that you already applied use the **Add Template** or **Remove Template** button.
Note: If Microsoft Word is not installed on your computer functions that require Microsoft Word will be deactivated.
 7. Click **Submit**.

Note: The Customer Follow-up feature is only functional when the subscription includes Elite Features

Chapter 4: Adding Customer and Vehicles

Adding Customers

To add a new *personal* customer:

1. From the **Main** shortcut bar, select **Customers**.

Result: The **Customer** list displays.

Name	Address	City	State	Postal Code	Phone
colanto, mike				00000	
Collins, Harry	0711 Las Vegas Blvd	Las Vegas	NV	00021	(215) 555-1212[H]
Customer, Joe				00000	
Customer3, Test	here and there	CYPRESS INN	TN	38452	
E, Brian				00000	888[H]
exmpt, non					
fatmi, selene					(603) 555-4567[H]
Feldhaus, Chuck				00000	(555) 666-7777[H]
Foertsch, Geary				00000	888[H]
Frye, Glen				00000	
gehia, rose					(901) 666-4567[H]
jesko, amy					
Jones, Pete				00000	
Karz, Mike	456 Magee Street	Orlando	FL	56789	(407) 555-3456[H]
Lee, Jim	3456 Nauldo Road	Philadelphia	PA	19123	(215) 555-9807[H]
malley, tom					(901) 666-7654[B]
malleyq, m					(901) 666-8765[B]
McNally, Frank				00000	
McNally, kat					(901) 666-8765[B]
Mitchell, Wayne				00000	777[B]
Murry, Bill				00000	
Muere, Thomas				19154	

Note: The **Create Order** button can be used to go directly to a blank quote window.

2. Click **New**.

Result: A **New Customer** window is displayed.

Note: If you add a record, ManageSM will populate the Customer Name field with information entered in the Customer Name search field.

New Customer

Information | Service History | Payment Record | Comments

Customer Information

Personal Business

Name: ...

Filed as:

Name 2:

Address:

Postal Code:

City:

State/Prov.:

Follow-up:

Home:

Business:

Mobile:

Pager:

Email:

Customer Type:

Resale Number:

Tax Schedule:

Labor Tax Exempt Parts Tax Exempt

Vehicles

Year	Make	Model	Engine	VIN	Li

Edit Vehicle
Add Vehicle
Remove Vehicle
Assign Vehicle

Customer Name field cannot be blank.

Submit Cancel

3. On the **Information** tab, select the **Personal** option.

- Click the ... button (after the **Name** field).
Result: A **Customer Name** dialog box is displayed.



- Type your customer's First Name and Last Name (optionally include Prefix, Middle Name and Suffix) and click **Submit**.
- In the **New Customer** window, select or enter information in the following fields:

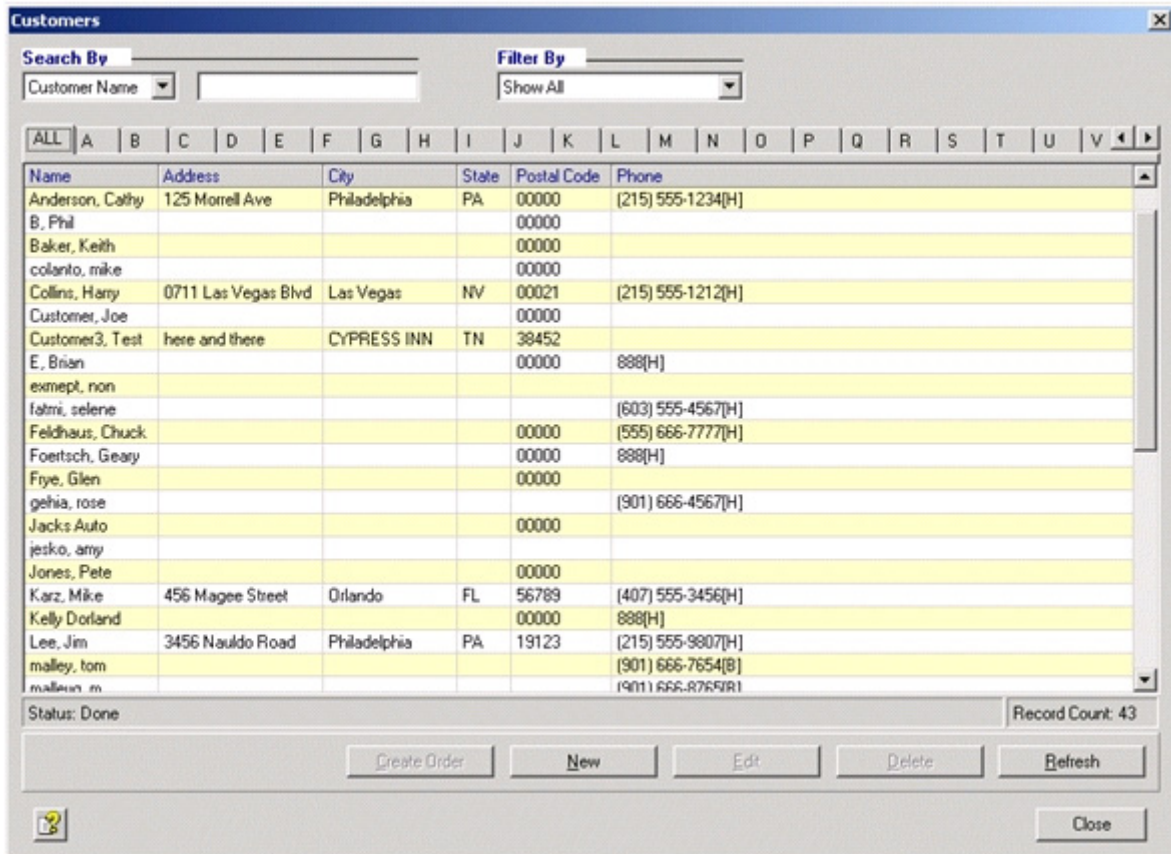
Name 2	If appropriate, enter an additional contact name.
Address	The customer's address.
Postal Code	The customer's postal code (5-9 alphanumeric characters). Note: The City and State/Prov. fields are prefilled if the first 5 digits of the code entered in the postal code field is recognized by Manage.
City	The customer's city. The City field is prefilled if the code entered in the postal code field is recognized by Manage (50 character maximum.) Note: Only the first 5 digits of the postal code are used to determine the City and State/Prov. values. When the City field is pre-filled the value of the City Name Case field on the Preference tab determines if it is completely capitalized or capitalized as a title.
State/Prov.	The Customer's state or province. (4 character maximum.) Note: The City and State/Prov. fields are prefilled if the code entered in the postal code field is recognized by Manage . Only the first 5 digits of the postal code are used to determine the City and State/Prov. values.
Follow-up	When active, use the Follow-up field to select the format for Customer Follow-up letters. The options are: <ul style="list-style-type: none"> • None • MARKET Email • MANAGE Mail Merge
Home	The customer's home telephone number (20 character maximum).

	Note: If you do not enter an area code when entering a customer phone number, your shop area code is automatically inserted.
Business	The customer's business telephone number (20 character maximum). Note: If you do not enter an area code when entering a phone number, your shop area code is automatically inserted.
Mobile	The customer's mobile or cell telephone number (20 character maximum). Note: If you do not enter an area code when entering a phone number, your shop area code is automatically inserted.
Pager	The customer's pager telephone number (20 character maximum). Note: If you do not enter an area code when entering a phone number, your shop area code is automatically inserted.
Email	The customer's email address. (50 character maximum.) Note: The Email field (a@b.ccc) is required when the Customer Follow-up format field is set to MARKET Email.
Customer Type	Use the Customer Type drop-list to select a customer type.
Resale Number	Type the customer's Resale Number (30-character maximum),if one applies.
Tax Exempt	The Labor Tax Exempt or Parts Tax Exempt check boxes default depending on the selected customer type. Change the setting as appropriate.
Tax Schedule	Select the Tax Schedule to use for orders from this customer.

7. Click **Submit**.

To add a new *business* customer:

1. From the **Main** shortcut bar, select **Customers**.



- In the **Customers** list, click the **New** button.
*Result: A **New Customer** window is displayed.*

- On the **Information** tab, select the **Business** option.
- Type your customer's business or company name in the **Name** field and click **Submit**.
- Select or enter information in the following fields:

Name 2	If appropriate, enter an additional contact name.
Address	The customer's address.
Postal Code	The customer's postal code (5-9 alphanumeric characters). Note: The City and State/Prov. fields are prefilled if the first 5 digits of the code entered in the postal code field is recognized by Manage.
City	The customer's city. The City field is prefilled if the code entered in the postal code field is recognized by Manage (50 character maximum.) Note: Only the first 5 digits of the postal code are used to determine the City and State/Prov. values. When the City field is pre-filled the value of the City Name Case field on the preference tab determines if it is completely capitalized or capitalized as a

	title.
State/Prov.	The Customer's state or province. (4 character maximum). Note: The City and State/Prov. fields are prefilled if the code entered in the postal code field is recognized by Manage . Only the first 5 digits of the postal code are used to determine the City and State/Prov. values.
Follow-up	When active, use the Follow-up field to select the format for Customer Follow-up letters. The options are: None Market Email Manage Mail Merge
Home	The customer's home telephone number (20 character maximum). Note: If you do not enter an area code when entering a customer phone number, your shop area code is automatically inserted.
Business	The customer's business telephone number (20 character maximum). Note: If you do not enter an area code when entering a phone number, your shop area code is automatically inserted.
Mobile	The customer's mobile or cell telephone number (20 character maximum). Note: If you do not enter an area code when entering a phone number, your shop area code is automatically inserted.
Pager	The customer's pager telephone number (20 character maximum). Note: If you do not enter an area code when entering a phone number, your shop area code is automatically inserted.
Email	The customer's email address. (50 character maximum.) Note: The Email field (a@b.ccc) is required when the Customer Follow-up format is set to MARKET Email.
Customer Type	Use the Customer Type drop-list to select a customer type.
Resale Number	Type the customer's Resale Number (30-character maximum) if one applies.
Tax Exempt	The Labor Tax Exempt or Parts Tax Exempt check boxes default depending on the selected customer type. Change the setting as appropriate.
Tax Schedule	Select the Tax Schedule to use for orders from this customer.

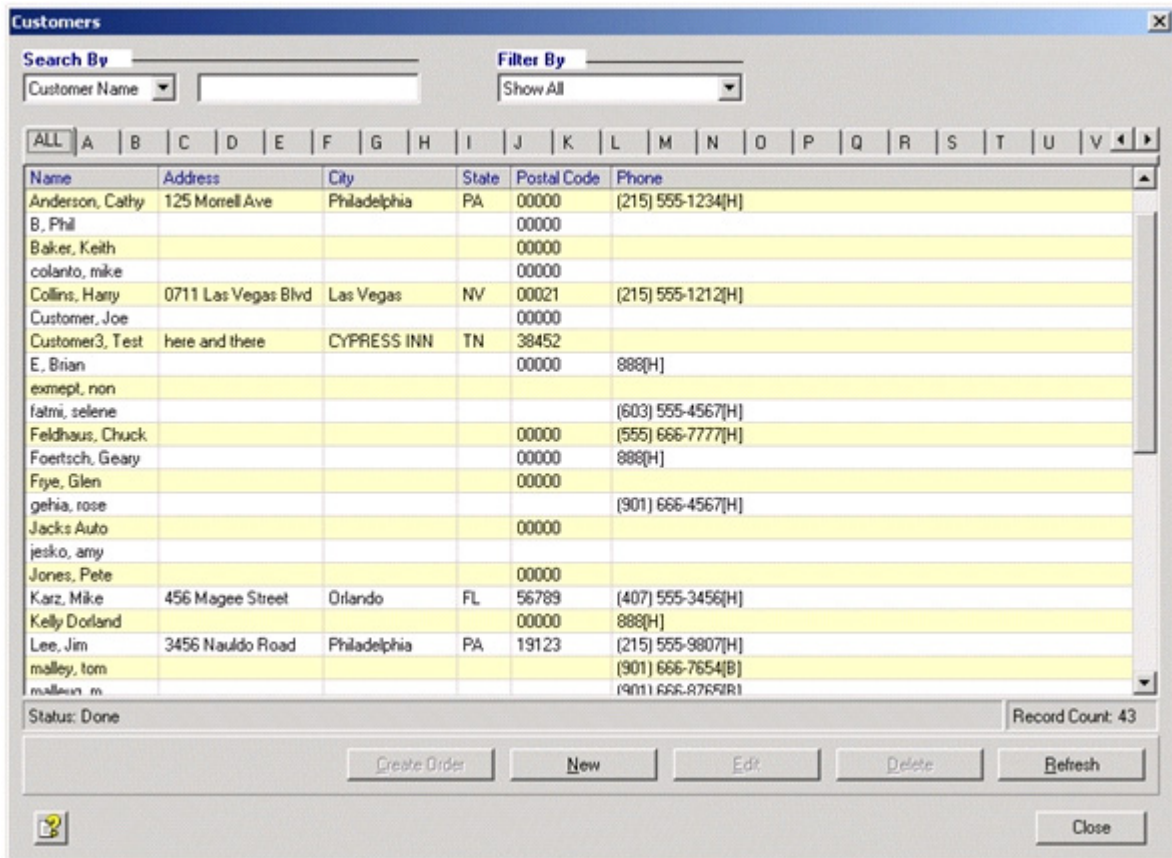
6. Click **Submit**.

Adding Vehicles

Vehicles are added to customers using the **Customers** list. You cannot add vehicles that are independent of a customer.

To add a new vehicle to a customer:

1. From the **Main** shortcut bar, select **Customers**.



2. Select the customer to whom you are adding a vehicle, and click **Edit**.

Result: An **Edit Customer** window is displayed.

Edit Customer: mia figg

Information Service History Payment Record Comments

Company Information

Personal Business

Name: mia figg

Filed as: mia figg

Name 2:

Address:

Postal Code: 38103

City: MEMPHIS

State/Prov.: TN

Follow-up: None

Home:

Business: (901) 666-9876

Mobile:

Pager:

Email: mfigg@gnet.com

Customer Type: System Default

Resale Number:

Tax Schedule: System Default

Labor Tax Exempt Parts Tax Exempt

Vehicles

Year	Make	Model	Engine	VIN	Li

Edit Vehicle

Add Vehicle

Remove Vehicle

Assign Vehicle

Submit Cancel

3. Click **Add Vehicle**.

Result: The **Select Vehicle YMME Description** window displays, allowing you to choose the Year, Make, Model, and Engine.

Note: Vehicle, parts, diagnostic, and repair information is accessed via YMME. YMME represents:

- Year - 1942 to the current year
- make
- model
- engine information

4. Make your selection and click **Submit**.
*Result: A **New Vehicle** window is displayed.*

5. Select or enter information in the following fields:

Customer Name	Verify the name.
YMME Selection	If needed edit the vehicle Year, Make, Model and Engine information or click Select Vehicle to use the Select Vehicle YMME Description drop-down lists to select a different Year, Make, Model and Engine .
Tax Exempt	The Labor Tax Exempt or Parts Tax Exempt check boxes default depending on the selected customer type. Change the settings as appropriate.
License	Optionally type the vehicle License ID. Note: Neither the License nor the VIN is required by Manage but may be required when using Data Validation ("Setting Data Validation Levels" on page 19).
VIN	Optionally type the vehicle ID number. Note: Neither the License nor the VIN is required by Manage but may be required when using Data Validation ("Setting Data Validation Levels" on page 19).

	Validation Levels" on page 19).
Transmission	Optionally type the vehicle transmission information
Color	Optionally type the vehicles color.
Manufacture Date	Optionally type the vehicles manufacture date.
Unit #	Optionally type additional information for fleet vehicles
Current Mileage	Optionally type the vehicle's current mileage reading.
Service Interval	Optionally type a vehicle next recommended service interval.
Tax Schedule	Select the Tax Schedule to use for orders from this vehicle.

6. Click **Submit**.

Chapter 5: Creating Orders, Jobs, and Line Items

Each order is associated with one customer and one vehicle. You can create four different types of orders: quotes, estimates, repair orders and counter sales. Orders contain jobs. Jobs can be created from data entry, from stored shop jobs, from recommendations, or from service interval recommendations. Jobs, in turn contain line items, which can be parts, labor items, sublet items, miscellaneous charges, and notes.

Different color headings help distinguish the type of order you are viewing.

Creating New Orders

To Create a new estimate or repair order:

1. From the **Main** shortcut bar, select **New Estimate or Repair Order**.

Result: A new, blank order opens with the **Job View** tab selected.

The screenshot displays the ALLDATA MANAGE software interface for creating a new quote. The main window is titled 'Quote' and contains several input fields and a table. The 'Job View' tab is selected, showing a table with columns: Job Name, Type, Part #/Code, Description, Vendor, Qty/Mts, Cost/Fig/Hrs, Retail, and Line Total. Below the table is a 'Job Description' field and a 'Job Totals' summary showing Job Subtotal, Discount, Hazmat, Supplies, and Job Total, all at \$0.00. On the right side, there are two summary panels: 'Line Item Totals By Type' and 'View Discounts', both showing \$0.00 for all categories. The bottom of the window has buttons for 'Save as Est', 'Save as BO', 'Save as Appointment', 'Repair Information', 'Disclaimers', and 'Customer Followup'. A status bar at the bottom indicates 'Customer Information is required to print or save'.

2. Determine if you want to start the process with customer information or vehicle information.

3. If starting with customer information, click **Customer**.
Result: The **Select Customer** list displays.

Name	Address	City	State	Postal Code	Phone
Anderson, Cathy	125 Morrell Ave	Philadelphia	PA	00000	(215) 555-1234[H]
B, Phil				00000	
Baker, Keith				00000	
colanto, mike				00000	
Collins, Harry	0711 Las Vegas Blvd	Las Vegas	NV	00021	(215) 555-1212[H]
Customer, Joe				00000	
Customer3, Test	here and there	CYPRESS INN	TN	38452	
E, Brian				00000	888[H]
exempt, non					
fatri, selene					(603) 555-4567[H]
Feldhaus, Chuck				00000	(555) 666-7777[H]
Foertsch, Geary				00000	888[H]
Frye, Glen				00000	
gehia, rose					(901) 666-4567[H]
Jacks Auto				00000	
jesko, arny					
Jones, Pete				00000	
Karz, Mike	456 Magee Street	Orlando	FL	56789	(407) 555-3456[H]
Kelly Dorland				00000	888[H]
Lee, Jim	3456 Nauldo Road	Philadelphia	PA	19123	(215) 555-9807[H]
malley, tom					(901) 666-7654[B]
maileun m					(901) 666-8765[R]

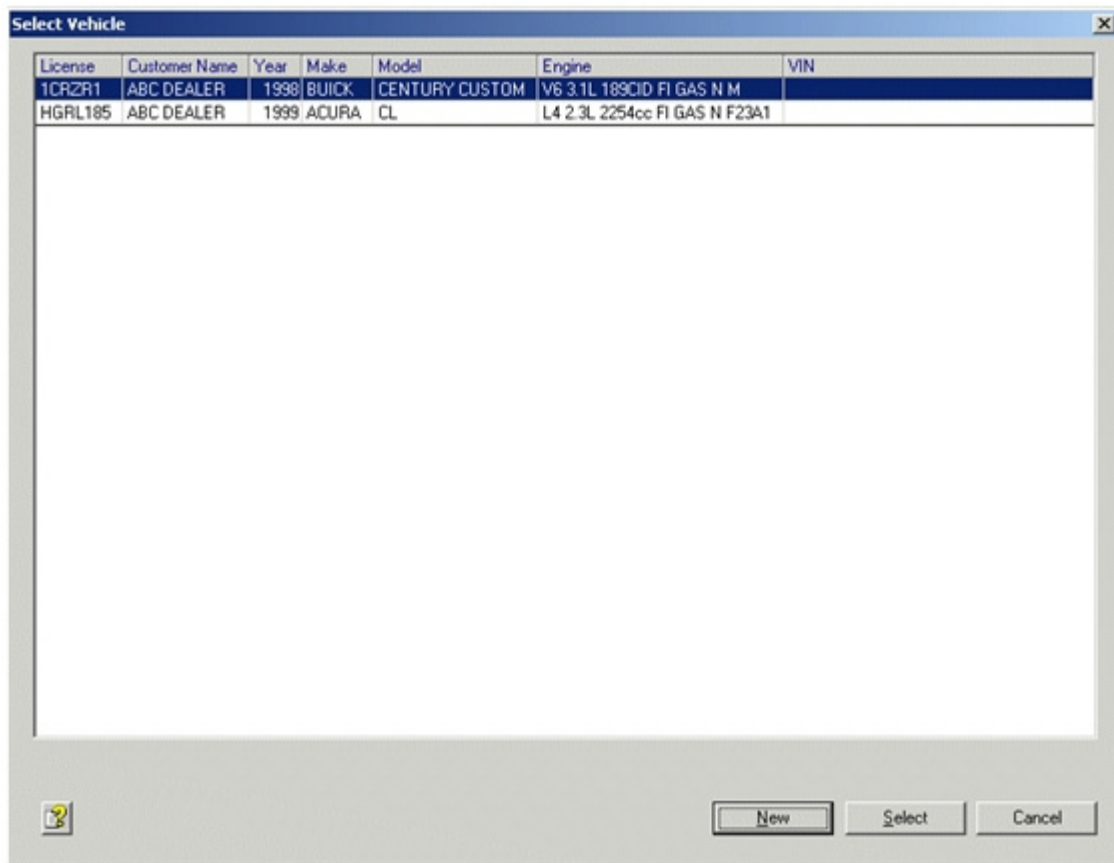
Status: Done Record Count: 43

Buttons: Create Order, New, Edit, Delete, Refresh, Close

- For returning customers:
 Search for and select the customer and click **Select**.
 When the **Select Vehicle** list displays select the vehicle to use.
- For new customers:
 Click **New** to open the **New Customer** window. Add the customer information, and then click the **Add Vehicle** button to add a vehicle to the customer. Click **Submit** after entering vehicle information, and again to close the **New Customer** window and return to the order.

4. If starting with vehicle information, click **Vehicle**.

Result: The **Select Vehicle** list displays.



5. Select a vehicle.

Result: The **Select Vehicle** list closes and the order updates with the vehicle and customer information.

6. Enter general order information in the appropriate area of the window. This information may include:

- tag or window hanger number in the **Key Tag #** field
- mileage in the **Mileage In** field (Important for service interval jobs)
- service advisor in the **Written By** field
- promised date in the **Promised Date** field
- whether to save old parts in the **Save Parts** field

7. From the button bar, above the grid, use the following buttons as described:

- **Select All** or **Select None** to include or exclude all jobs in the order. (This button is active only after a job has been added to the order.)
- **Add Job >>** to Add jobs to the order. Refer to "Creating Jobs" on page 59.

- **Edit Job** to modify a job after you create it. The order does not have to be saved before you modify the job (see "Editing Jobs and Items" on page 78).
 - **Edit Item** to modify an item after the job has been created (see "Editing Jobs and Items" on page 78).
 - **Delete Job** to delete the selected job.
 - **Rollback Job** to undo the last deletion.
 - **Parts & Labor/Catalogs** to access the OEM Parts & Labor and AfterMarket Catalogs feature. The Catalogs feature can be used to search for and add parts to the order.
8. From the button bar, below the grid, use the following buttons as described:
- **Save as Est** to store the order as an estimate (see "Saving an Order as an Estimate" on page 74). This button is only available before the order is saved as an estimate.
 - **Save as RO** to save the order as a repair order (see "Saving an Order as a Repair Order" on page 74). This button is only available before the order is saved as a Repair Order.
 - **Save** to save the updated repair order after it was already saved as an estimate (See "Saving a Repair Order" on page 75). This button is only available after the order is saved as an estimate.
 - **Conv. to Inv** to save the order as an invoice after it has been saved as a repair order (see "Converting a Repair Order to an Invoice" on page 75). This button is only available after the order is saved as a Repair Order and before it is converted to an invoice.
 - **Conv. to RO** to save the order as a repair order after it has been converted to an invoice (see "Converting an Invoice Back to a Repair Order" on page 75). This button is only available after the order is converted to an invoice.
 - **Save as Appointment** to open the **New Appointment** window, with the information entered for the order. Refer to "Completing the New Appointment window" on page 128, to see an example of the window. **Note:** The **Save as Appointment** button is only available for new Quotes and only before they are saved.
 - **Repair Information** to search a library of automotive repair information.
 - **Disclaimers** to open a Disclaimer Selection window, where you can select or create disclaimers to add to the order.
 - **Customer Follow-up** to open a Customer Follow-up dialog box to add a follow-up message to the order.
9. On the Line Item View tab you can view all the line items for all the jobs on the order.
10. Add additional jobs containing **AfterMarket** parts (refer to "Adding Parts to Jobs from the AfterMarket Catalogs" on page 90) to the order using the **Parts & Labor/Catalogs** button.
11. On the **Aftermarket Parts View** tab, you can click **Stock Check** to check current price and availability, you can click **Order Parts** to order the selected aftermarket parts (see "Checking the Price and Availability" on page 89).
Note: This tab is accessible only when aftermarket parts are included on the order.
12. When you are done entering information for the job, click **Close** to save the order and close the order window.

Creating Jobs

1. On the order form, click the **Add Job>>** button.

A rectangular button with a light gray background and a thin border. The text "Add Job >>" is centered on the button in a dark gray font.

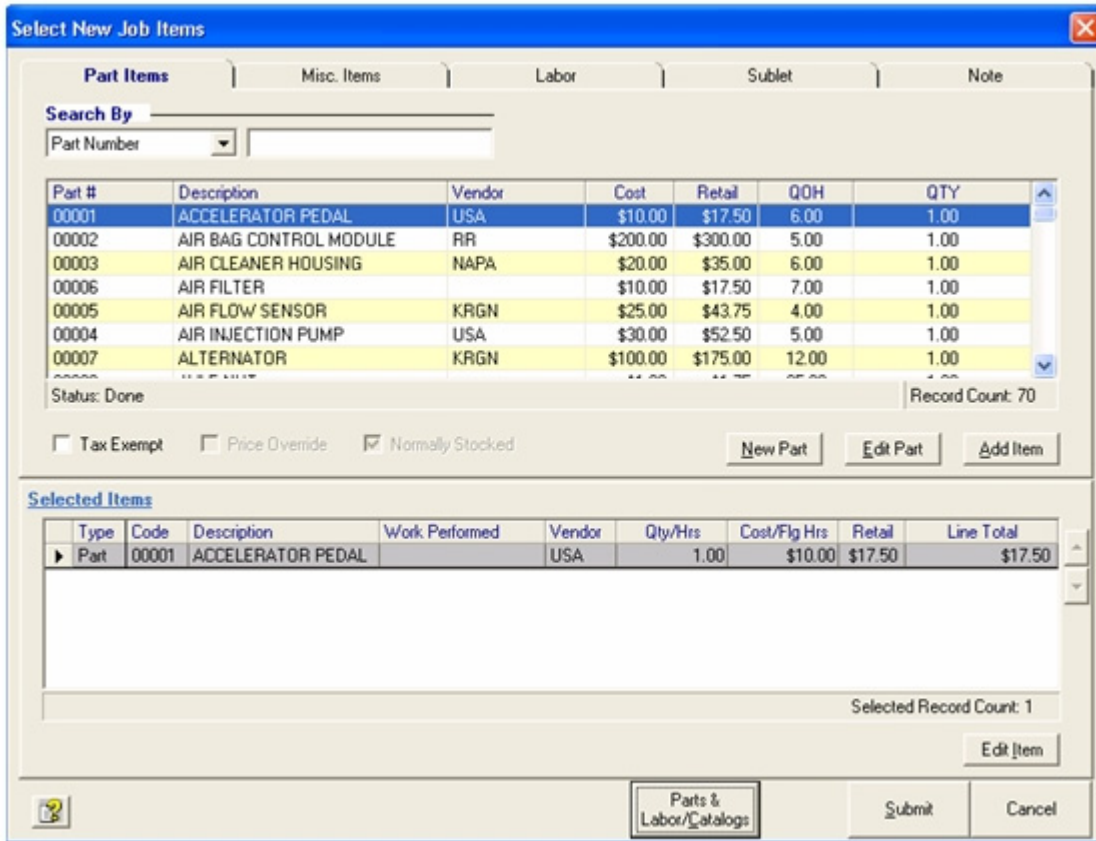
2. Select the type of job that you want to create:
 - If **New Job** is selected, a **New Job** window is displayed with the **Select New Job Items** window open over it. Refer to "Add New Job" on page 60.
 - If **Generic Shop Job** is selected, a **Generic Shop Job Selection** window is displayed. Refer to "Add Generic Shop Job to an Order" on page 62.
 - If **Specific Shop Job** is selected, a **Specific Shop Job Selection** window is displayed. Refer to "Add Specific Shop Job to an Order" on page 63.
 - If **Service Interval** is selected, a **Select Service Interval** list is displayed. Refer to "Add Service Interval Job" on page 64.
 - If **Recommendation** is selected, a **Recommendation Selection** window displays. Refer to "Add Recommendation to an Order" on page 66.

Note: The recommendation option displays only if recommendations exist for the selected vehicle and the specific shop job option displays only if specific shop jobs exist for the selected vehicle.

Add New Job

1. From the order form, click **Add Job >>** and select **New Job** from the options list.

Result: The **Job** window is displayed with the **Select New Job Items** window opened over it.



2. Use the different tabs and the available buttons to select or create line items (see "Adding Items to Jobs" on page 67) to add to the job.

Result: The Selected Items grid shows the items that have been selected to add to the job.

3. When you have finished entering line items, click **Submit**.
Result: The **New Job** window is displayed.

New Job: DONALD DILLWEED 2002 HONDA INSIGHT ELECTRIC L3 1.0L 995CC 61CID FI ELECTRIC/GAS N ECA1

Job Name	Category	Assigned Technician	Status
Job #1	Engine, Cooling and Extr	BOBBY BUICK	SHOP

Description	Symptom
Replace air flow sensor	

Buttons: Select None, Add Item, Edit Item, Delete Item, Rollback Item, Save As >>, Parts & Labor/Catalogs

Type	Code	Description	Vendor	Qty/Hrs	Cost/Flg Hrs	Retail
<input checked="" type="checkbox"/> Part	00005	AIR FLOW SENS...	KRGN	1.00	\$25.00	\$43.75
<input checked="" type="checkbox"/> Labor	Rate 2	Replace air flow s...		1.00	50.00	\$100.00

Line Item Totals By Type

Parts:	\$43.75
Labor:	\$100.00
Sublet:	\$0.00
Misc:	\$0.00
Subtotal:	\$143.75

Fixed Price:

Discount:	\$0.00
<input checked="" type="checkbox"/> Hazmat:	\$14.38
<input checked="" type="checkbox"/> Supplies:	\$14.38
Total:	\$172.51

Buttons: Submit, Cancel

4. Use the **Add Item** button to add more line items.
5. Use the **Edit Item** button to make changes to line items after you have saved them to the job.
6. Use the **Delete Item** button to delete the selected line item.
7. Use the **Rollback Item** button to undo the last deletion.
8. Use the **Save as >>** button and select the type of shop job to save. This saves the job as a shop job for use in the future.
9. Use the **Parts & Labor/Catalogs >>** button (see "Chapter 8: Catalogs" on page 86) to use the catalog lookup function to add lines items to the job.
10. When done adding line items to the job, click **Submit**.

Add Generic Shop Job to an Order

Note: This procedure describes adding an existing Generic Shop Jobs to an order. Refer to “Creating Shop Jobs” on page 70 for a instructions on creating a Shop Job.

1. From the order form, click **Add Job >>** and select **Generic Shop Job**, the **Generic Shop Job Selection** window displays.

Name	Description	Total
<input checked="" type="checkbox"/> All Labor Shop Job 200	All Labor Shop Job Description	\$200.00
<input type="checkbox"/> All Parts Shop Job	All Parts Shop Job Description	\$1,124.00
<input type="checkbox"/> Fixed Price Shop Job	Description for Fixed Price Shop Job	\$495.00
<input type="checkbox"/> hn	kp	\$402.38
<input type="checkbox"/> Parts Labor Misc Sublet Job	Parts, Labor, Misc & Sublet Shop Job	\$305.00
<input type="checkbox"/> Shop Jobs1	No Description Given	\$300.00
<input type="checkbox"/> Tax exempt items Shop Job	Tax exempt shop job description	\$230.00
<input type="checkbox"/> With Hazmat & Supplies Job	With Hazmat and Supplies, Shop Job Description	\$151.00
<input type="checkbox"/> xdfsadsad	No Description Given	\$100.00

Status: Done Record Count: 9 Selected Record Count: 0

Buttons: New, Edit, Submit, Cancel

2. Use the check boxes to select the generic shop jobs that you want to add.
3. Click **Submit**.
Result: The selected Generic Shop Jobs are added to the order and the order form is displayed.

Add Specific Shop Job to an Order

Note: The Specific Shop Job option only displays when the selected vehicle YMME type matches a saved specific shop job.

This procedure describes adding an existing Specific Shop Jobs to an order. Refer to "Creating Shop Jobs" on page 70 for a instructions on creating a Shop Job.

1. From the order form, click **Add Job >>** and select **Specific Shop Job**, the **Specific Shop Job Selection** window displays.

Name	Description	Vehicle	Total
<input checked="" type="checkbox"/> All Labor Shop Job 200	All Labor Shop Job Description	2002 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D...	\$200.00
<input type="checkbox"/> All Parts Shop Job	All Parts Shop Job Description	2002 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D...	\$225.00
<input type="checkbox"/> Fixed Price Shop Job	Description for Fixed Price Shop Job	2002 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D...	\$495.00
<input type="checkbox"/> Job #1	No Description Given	2002 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D...	\$28.00
<input type="checkbox"/> Parts Labor Misc Sublet Job	Parts, Labor, Misc & Sublet Shop Job	2002 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D...	\$305.00
<input type="checkbox"/> R/R	Remove/Replace	2002 HONDA CIVIC EX L4 1.7L 1700cc FI GAS N D...	\$100.00

2. Using the check box, select the specific shop jobs that you want to add.

3. Click **Submit**.

Result: The selected Specific Shop Jobs are added to the order and the order form is displayed.

Add Service Interval Job

Note: It is recommended that you select a vehicle before adding a service interval job.

1. From the order form, click **Add Job >>** and select **Service Interval Job** from the **Add Job From** field.

Result: The **Select Service Interval** list opens with the available service schedule options listed.

2. Select the service interval from the list or select the **Type of Service** in the **Service Schedule** drop down box and select a service interval from the updated list.

Result: The Select Service Interval result window is displayed.

3. To send the part and service information for the selected service interval to the Catalog Viewer, click **Get P & L**.



Result: The **Catalog Viewer** is opened with the catalog parts for the selected Service Interval displayed.

Catalog	Vendor	Description	Part #	Code	Cost	List	Core	Qty Requested	Store	Network	Hub
<input checked="" type="checkbox"/>	OEM	Oil Filter - Duraguard HPF47	25010752		\$7.30			1			
<input type="checkbox"/>	OEM	Oil Filter - Duraguard Silver	25325404		\$0.00			1			
<input type="checkbox"/>	OEM	Oil Filter - Ultraguard Gold	25322835		\$0.00			1			

Labor	Description	Skill Level	Warranty Hours	Standard Hours
<input checked="" type="checkbox"/>	OIL FILTER - Replace	C	0.0	0.3
<input type="checkbox"/>	OIL FILTER - Replace - NOTE - To Change Oil,Add	C	0.0	0.1

Notes:

Status: Done

- Select the items to add to the Service Interval Job, use the **Add Selected** button to add the line items and click **Submit**.

Result: The **Add Service Interval Jobs** window displays with the items listed.

New Service Interval Job: ELMER ECLAIR 1990 DAIHATSU CHARADE SE L3 1.0L 993CC 61CID F1 GAS N 0

Service: 60000 MI OR 96000 KM | Service Schedule: Normal Service | Assigned Technician: BOBBY BUICK | Status: [Dropdown]

Description: MAINTENANCE - MAINTENANCE - Service or Charge - 60,000 Miles

Type	Code	Description	Vendor	Qty/Hrs	Cost/Flg Hrs	Retail	Line Total
<input checked="" type="checkbox"/>	Part	1351487283000	OEM - TIMING B	1.00	\$30.65	\$45.98	\$45.98
<input checked="" type="checkbox"/>	Part	1560187204000	OEM - Oil Filter EL.	1.00	\$5.95	\$8.93	\$8.93
<input checked="" type="checkbox"/>	Part	2330087724000	OEM - FUEL FILT...	1.00	\$30.10	\$45.15	\$45.15
<input checked="" type="checkbox"/>	Labor	Rate 3	MAINTENANCE - ...	2.75	0.00	\$125.00	\$343.75
<input type="checkbox"/>	Part		Timing Belt	1.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	Part		Spark Plug	1.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	Part		Oil Filter	1.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	Part		Fuel Filter	1.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	Part		Fuel Filter Cap	1.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	Part		Engine Oil	1.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	Part		Air Filter Element	1.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/>	Note/Title		1 - ADJUST				

Line Item Totals By Type

Parts: \$100.06
 Labor: \$343.75
 Sublet: \$0.00
 Misc: \$0.00
Subtotal: \$443.81

Fixed Price:

Discount: \$0.00
 Hazmat: \$44.38
 Supplies: \$30.00
Total: \$518.19

Job Revision Totals

Authorized Est: \$0.00
 Additional Cost: \$0.00
 Revised Est: \$0.00

Buttons: Select All, Add Item, Edit Item, Delete Item, Rollback Item, Save As >>, Parts & Labor Catalogs, Submit, Cancel

- Add any additional line items.
- Click **Submit**.

Add Recommendation to an Order

Note: Select a vehicle before adding a recommendation. This activates the recommendations indicator in the Status bar of the window if any recommendations exist for the vehicle. For more information, refer to "Recommendations" on page 122.

1. From the order form, click **Add Job >>** and select **Recommendation**.

Result: The **Recommendation Selection** window displays.

The screenshot shows the "Recommendation Selection" window. It features a search and filter section at the top, a table of job recommendations, and a status bar at the bottom. The table lists various job types such as "All Parts Shop Job", "Fixed Price Shop Job", "Parts Labor Misc Sublet Job", "R/R", and "Recommendation". The first row is selected, and its details are shown in a larger view below the table.

Name	Description	Vehicle	Interval Mileage	S
<input checked="" type="checkbox"/> All Parts Shop Job	All Parts Shop Job Description	2002 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D...	3000	4
<input type="checkbox"/> All Parts Shop Job	All Parts Shop Job Description	2002 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D...	3000	7
<input type="checkbox"/> Fixed Price Shop Job	Description for Fixed Price Shop Job	2002 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D...	3000	4
<input type="checkbox"/> Fixed Price Shop Job	Description for Fixed Price Shop Job	2002 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D...	3000	7
<input type="checkbox"/> Parts Labor Misc Sublet Job	Parts, Labor, Misc & Sublet Shop Job	2002 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D...	3000	7
<input type="checkbox"/> R/R	Remove/Replace	2002 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D...	3000	8
<input type="checkbox"/> Recommendation	jkjk	2002 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D...	3000	7

Status: Done Record Count: 7 Selected Record Count: 0

Buttons: Submit, Cancel

2. Use the check boxes to select the recommendations that you want to add.

3. Click **Submit**.

Result: The selected Recommendations are added to the order and the order form is displayed.

Adding Items to Jobs

1. From the Job form (New Job or Edit Job window), click **Add Item** or from the order form, click **Add Job >>** and select **New Job** from the options list.

Result: The **Select New Job Items** window displays with the Labor tab selected.

2. Select the appropriate tab:

- Part Items - In the parts grid, select a part and in the QTY field, use the down arrow to select the quantity to add. Click **Add Item** to add the parts to the selection grid.
Note: Decimal values are now allowed in quantity fields.
- Misc Items - In the Misc item grid, select an item and in the QTY field, use the down arrow to select the quantity to add. Click **Add Item** to add Misc items to the selection grid.
Note: Decimal values are now allowed in quantity fields.
- Labor - Select or enter information in the following fields and click **Add Item** to add the Labor item to the selection grid.

Labor Rate	Select a labor rate from the configured list.
Work Requested	Enter a description of the work requested.
Work Performed	Enter a description of the work performed. You can leave this field blank until the work is completed.
Account	Select the QuickBooks Account assigned to the line item. This field only

	displays when accounting is integrated.
Tax Exempt	Select or de-select this flag to indicate if the part is tax exempt.
Hours	Enter the estimated number of labor hours required.
Flagged Hours	Enter the actual time spent to complete the job. Note: You can leave this field blank until the work is completed.
Retail	The retail charge is calculated based on the cost, the Price Override settings, and the Markup settings from the Company Setup window. If you want to override the markup, type over the amount in this field.

- Sublet - Select or enter information in the following fields and click **Add Item** to add Sublet items to the selection grid.

Work Requested	Enter a description of the work requested.
Work Performed	Enter a description of the work performed. You can leave this field blank until the work is completed.
Vendor	The vendor or supplier name.
Account	Select the QuickBooks Account assigned to the line item. This field only displays when accounting is integrated.
Qty	This indicates the quantity added to the estimate.
Cost	The cost after discounts or markups.
Retail	The retail charge is calculated based on the cost, the Price Override settings, and the Markup settings from the Company Setup window. If you want to override the markup, type over the amount in this field.
Tax Exempt	Select or de-select this flag to indicate if the part is taxable.

Note: The account field only displays when QuickBooks accounting integration is enabled.

- Note - Enter your note text in the field and click **Add Item** to add Note items to the grid.

Result: After clicking Add Item, the select items grid is updated with the following fields:

Type	The type of line item.
Code	The part number or code.
Description	A description of the item selected.
Work Performed	For Misc, Labor and sublet items this field contains a description of the work performed. Note: This field is where you enter details about the work after it is performed.
Vendor	The vendor or supplier name.
Qty/Hrs	The number of part or hours assigned.
Cost/Flg Hrs	The cost after discounts, markups, or the flagged hours.
Retail	The retail charge is calculated based on the cost, the Price Override settings, and the Markup settings from the Company Setup window.
Line Total	The total cost for the line (Qty x Retail).

3. When done adding items to the Job, click **Submit**.

Result: The line items are added to the selected items grid on the Job form.

Viewing Orders by Line Items

1. On an order form or invoice form, select the **Line Item View** tab.



Result: The **Line Item View** tab is displayed.

Quote

Customer: Name: Mia Figg Personal Phone: Business Phone: (901) 666-9876
 Vehicle: 2004 HONDA CIVIC EX L4 1.7L 1700CC FI GAS N D17A2

Refer to Est. # Key Tag # Mileage In Mileage Out *
 Date Written: 01/29/2008 Written By: Promised Date: Not Specified Save Parts: No

* Warning ** Required

Job Name	Line Type	Line Code	Line Description	Qty/Hrs	Cost
Job #1	Misc	CHANGE	Change a flat tire	1.00	
Job #2	Part	SW3357	AUTOZONE/WELLS - WINDSHIELD WIPE...	1.00	
Job #2	Part	SW3470	AUTOZONE/WELLS - WINDSHIELD WIPE...	1.00	
Job #2	Part	SW3471	AUTOZONE/WELLS - WINDSHIELD WIPE...	1.00	
Alternator, Replace	Labor	Rate 2	Replace Alternator and test charging system	2.00	
Alternator, Replace	Part	00007	ALTERNATOR	1.00	
Brakes Check Complete	Labor	Rate 2	Remove all wheels and check condition of br...	0.50	
Cooling System - Overheating	Labor	Rate 2	Check for overheating. Pressure test cooling s...	1.00	
Inspection	Labor	Rate 2	Perform Annual Inspection	0.50	

Line Item Totals By Type

Parts: \$769.29
 Labor: \$280.00
 Sublet: \$0.00
 Misc: \$5.00
Subtotal: \$1,054.29

View Discounts: \$0.00
 Hazmat: \$59.93
 Supplies: \$30.50
 Tax: \$107.47
Total: \$1,252.19

Job View | **Line Item View** | Aftermarket Parts View

Save as Est | Save as BO | Save as Appointment | Repair Information | Disclaimers | Customer Follow-up

Take Deposit... | Post | Print | Close

Creating Shop Jobs

A shop job can be generic or specific to a vehicle of a defined YMME type. Shop Jobs consist of one or more part or service items.

You must create the Shop Jobs before they can be added to orders.

To create a shop job:

1. From the **Main** shortcut bar, select **Shop Jobs**.

Result: A list of Shop Jobs is displayed with the specific Shop Jobs filtered out. The Filter By field controls which Shop Jobs are displayed.

The list is blank if no specific shop jobs exist.

The screenshot shows a window titled "Shop Jobs" with a search and filter interface. The "Search By" field is set to "Name" and the "Filter By" field is set to "Generic Shop Jobs". The main area displays a table of shop jobs with the following data:

Name	Description	Total
All Labor Shop Job 200	All Labor Shop Job Description	\$200.00
All Parts Shop Job	All Parts Shop Job Description	\$1,124.00
Fixed Price Shop Job	Description for Fixed Price Shop Job	\$495.00
hn	kp	\$402.38
Parts Labor Misc Sublet Job	Parts, Labor, Misc & Sublet Shop Job	\$305.00
Shop Jobsj1	No Description Given	\$300.00
Tax exempt items Shop Job	Tax exempt shop job description	\$230.00
With Hazmat & Supplies Job	With Hazmat and Supplies, Shop Job Description	\$151.00
xdlsadsad	No Description Given	\$100.00

At the bottom of the window, the status bar shows "Status: Done" and "Record Count: 9". Action buttons for "New", "Edit", "Delete", "Refresh", and "Close" are visible.

2. Select Generic or Specific in the Filter By field.

Note: If Generic Shop Jobs is selected in the Filter By field, only Generic Shop Jobs are displayed and if Specific Shop Jobs is selected in the Filter By field, only specific Shop Jobs are displayed.

3. Click **New**.

Note: If adding a specific Shop Jobs, the **Select Vehicle YMME Description** window displays. Select the Vehicle information and click **Submit**.

Result: A **New Shop Job** window is displayed with the **Select New Job Items** window opened over it.

The screenshot shows the 'Select New Job Items' window with the 'Labor' tab selected. The 'Labor Rate' is set to 'Rate 2', 'Hours' is 1.00, 'Flagged Hours' is 0.00, and 'Retail' is \$100.00. The 'Work Requested' and 'Work Performed' fields are empty. A 'Tax Exempt' checkbox is unchecked. The 'Selected Items' table is empty. A warning message at the bottom left states 'Work Requested field cannot be blank.'

4. Select the appropriate tabs and add items to the job (see "Adding Items to Jobs" on page 67).
5. When done adding items to the Job, click **Submit**.
Result: The **New Shop Job** window is displayed.
6. Type a **Shop Job Name** and select a **Category**.
7. Enter a description or symptom if appropriate.
8. When finished entering information click **Submit**.

Creating Counter Sales

To create a new counter sale:

1. From the **Main** shortcut bar, select **New Counter Sale**.

Result: A new, blank Counter Sale order form opens.

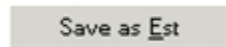
2. Enter customer and vehicle information (not required for a counter sale).
3. Type or select general order information (not required for a counter sale):
 - **Written By** - select a service advisor name
 - **Promised Date** - select a date or select Not Specified
 - **Save Parts** - select to indicate that the replaced parts don't need to be saved
4. From the button bar, above the grid, use the following buttons as described:
 - **Select All** or **Select None** to include or exclude all jobs in the order. (This button is active only after a job has been added to the order.)
 - **Add Job >>** to Add jobs to the order. Refer to "Creating Jobs" on page 59.
 - **Edit Job** to modify a job after you create it. The order does not have to be saved before you modify the job (see "Editing Jobs and Items" on page 78).

- **Edit Item** to make changes to line items after you have saved them to the job.
 - **Delete Job** to delete the selected job.
 - **Rollback Job** to undo the last deletion.
 - **Parts & Labor/Catalogs** to access the OEM Parts & Labor and AfterMarket Catalogs feature. The Catalogs feature can be used to search for and add parts to the order
5. From the button bar, below the grid, click **Save** to store the order as a counter sale.

Chapter 6: Saving and Converting Repair Orders

Saving an Order as an Estimate

1. Create an order.
2. Click the **Save As Est** button.



Result: The order is saved as an estimate, the field headings become bright yellow, and the order is assigned an estimate number.

Saving an Order as a Repair Order

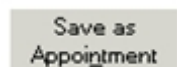
1. Create an order.
2. Click the **Save as RO** button.



Result: The order is saved as a repair order and is assigned a repair order number.

Saving an Order as an Appointment

1. Create an order.
2. Before saving the order, click the **Save as Appointment** button.

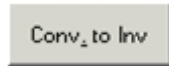


Result: The New Appointments window displays.

Note: The Save as Appointment button is only available for new orders and only before they are saved.

Converting a Repair Order to an Invoice

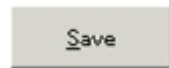
1. Create an order and save it as a repair order.
2. On the repair order, click the **Conv. to Inv** button.



Result: The order is converted to an invoice and the field headings become blue.

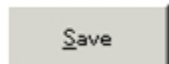
Saving a Repair Order

1. To save changes to a repair order, click the **Save** button.



Saving a Counter Sale

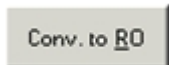
1. Create a counter sale.
2. Click the **Save** button.



Converting an Invoice Back to a Repair Order

Invoices can be converted back to repair orders if you need to make changes (such as adding or deleting line items).

1. Create an order.
2. Save it as a repair order.
3. Convert it to an invoice.
4. On the invoice, click the **Conv. to RO** button.



Result: The invoice is converted to a repair order.

Chapter 7: Work in Progress, Additions and Changes

Work in Progress Window

The **Work in Progress** window lists all your saved estimates, current work in progress, cashiered orders, and when they exist, un-posted paid invoices.

The window allows you to:

- Search orders, estimates, and invoices, using a variety of search criteria. Refer to "Viewing Work in Progress" on page 77.
- Edit Jobs. Refer to "Editing Jobs and Items" on page 78 below.
- Add parts to jobs. Refer to "Adding Items to Jobs" on page 67 or "Adding Parts to Jobs from the Catalog Viewer" on page 86.
- Use the **Print Technician Worksheet** button to print the Technician Worksheet - This report lists all the jobs assigned to the technician on the selected order.
- Save, convert, cashier, and post orders. Refer to Chapter 9: Documenting, Closing and Posting Orders.

Note: This window does not include posted orders, which are found in the Service History window.

Viewing Work in Progress

1. From the **Main** shortcut bar, select **Work in Progress, Saved Estimates**.

Result: The **Work in Progress** window displays.

Work In Progress

Search By
Filter By

Status	Order #	Customer Name	Phone #	Vehicle	License	Writer	Pickup Time
RO	4	Credit, Three	(333) 555-3333	1994 JEEP CHEROKEE COUN...	326598563		
RO	11	Figg, Mia		2002 HONDA CIVIC EX	MIASKAR		
RO	12	Figg, Mia		2002 HONDA CIVIC EX	MIASKAR		

Details

Job Name	Job Description	Technician	Status	Subtotal
Three				\$283.00

Status: Done Record Count: 3

2. Select the appropriate tab:

- Saved Estimates
- Work in Progress
- Cashiered
- To Be Posted

Note: This tab and the corresponding menu option only exist when paid invoices exist that have not been posted. Unposted paid invoices can be created when upgrading from a previous release of ManageSM.

3. Use the **Filter By** drop-list to adjust the type of records displayed.

4. Use the **Search By** drop-list, to determine the column to search for the search by text and to sort in ascending order.
5. In the **Search By** text box, enter the alphanumeric characters string to use in the search.

Editing Jobs and Items

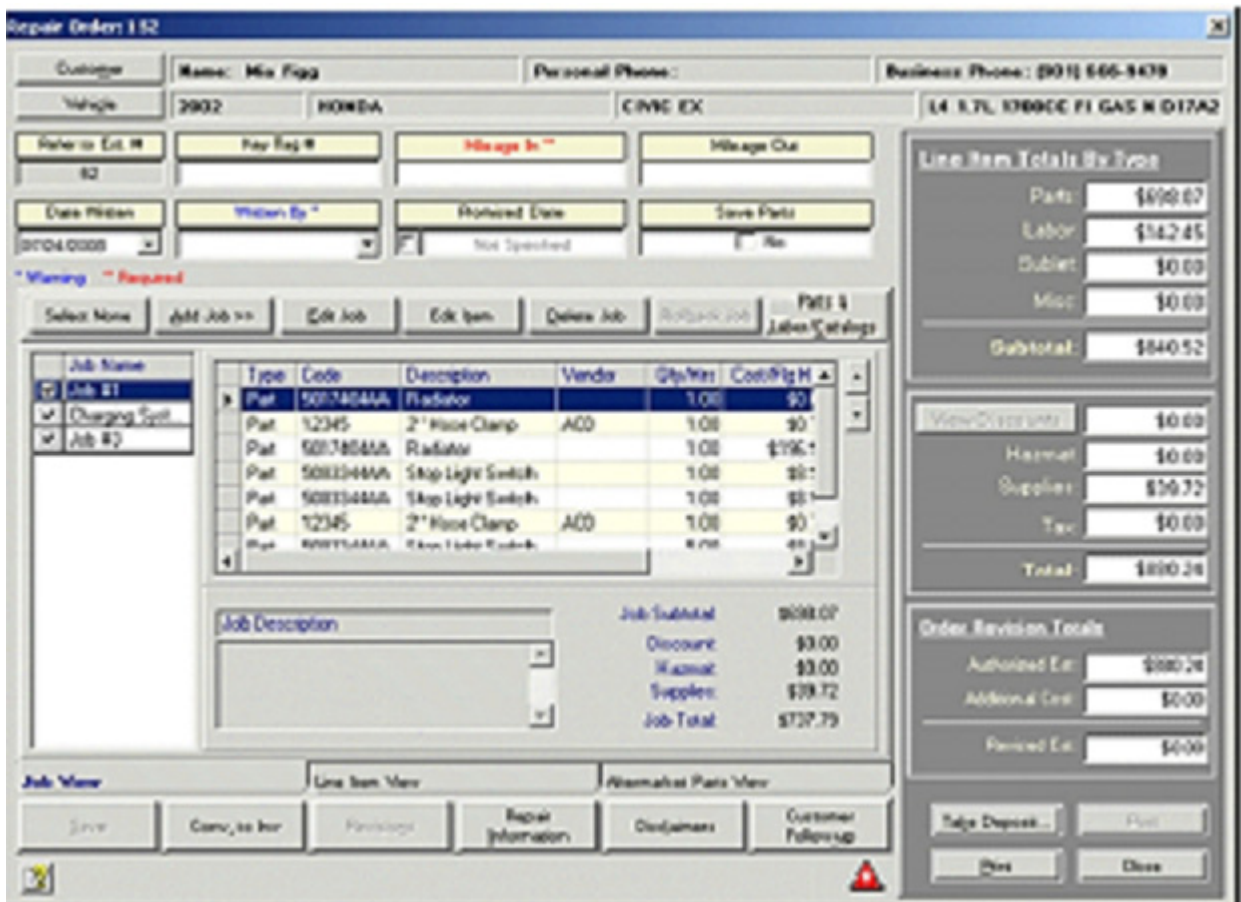
Manage order windows have been enhanced to allow the editing of line items directly from the order window.

Note: Jobs that were created from Shop Jobs or Recommendations are treated as regular jobs and are edited in the same way.

Editing Items from the Order Window

Manage order windows have been enhanced to allow the editing of line items from the order window.

1. On the **Work in Progress** window, select the **Saved Estimates** or the **Work in Progress** tab.
2. Select an order and click **Edit**.
Result: The order window is displayed.

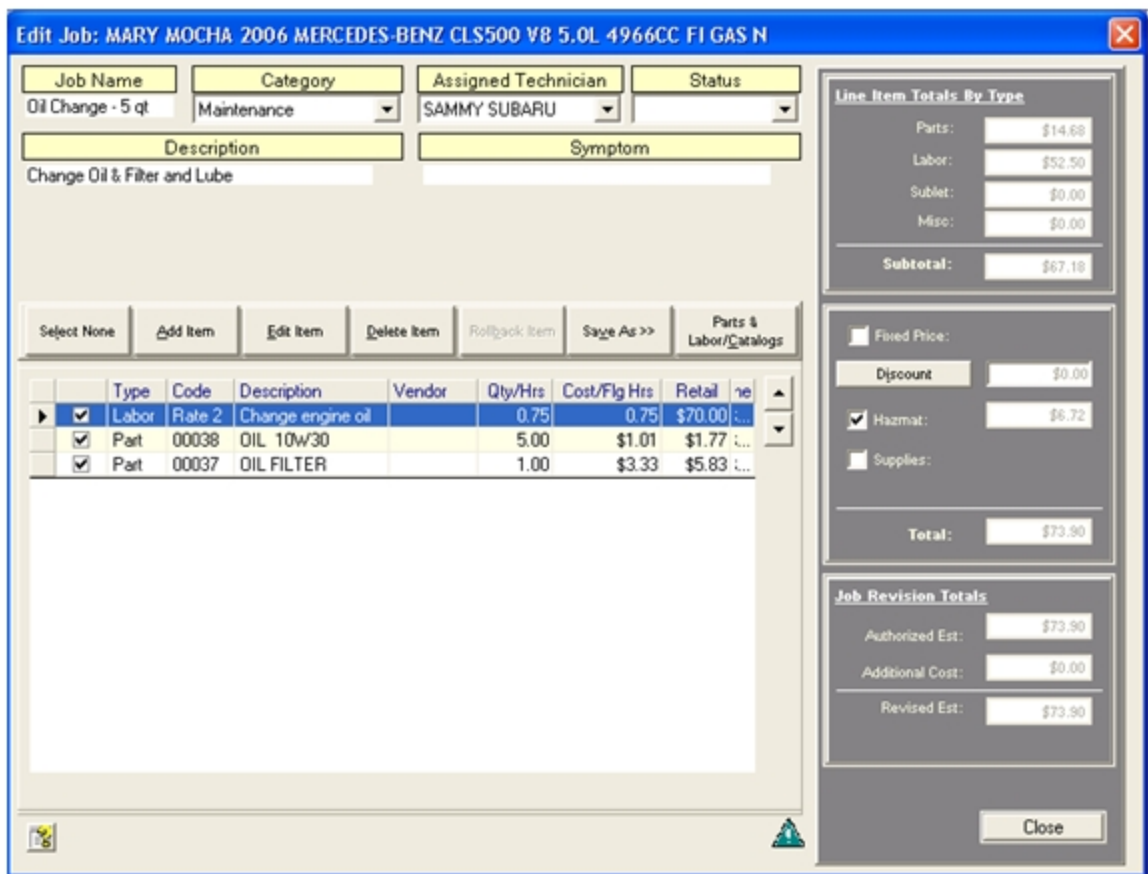


Note: You can change the order of items on the job by selecting a line item and clicking the Line Position arrows at the right side of the grid.

3. Select an Item from the Job grid and click **Edit Item**.
Result: The appropriate edit item (Part, Misc, Labor, Sublet, or Note) window is displayed.
4. Edit the item and click **Close**.
Result: The Edit Job window is displayed.
5. Make any changes that are needed and click **Close**.
Result: The order window is displayed.

Editing Jobs from the Job Window

1. On an order window, select a Job and click **Edit Job**.
Result: The **Edit Job** window is displayed.



Note: You can change the order of items on the job by selecting a line item and clicking the Line Position arrows at the right side of the grid.

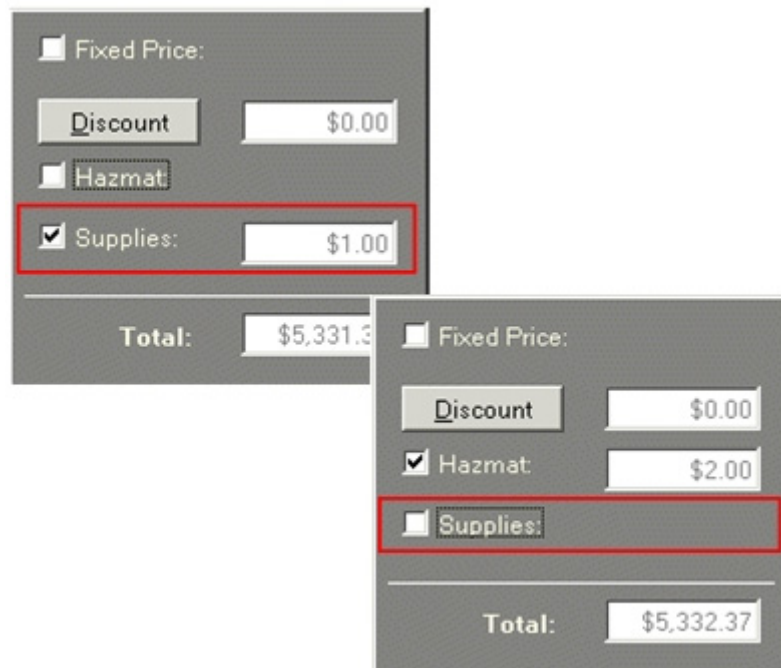
2. From the button bar, above the grid, use the following buttons as described:

- Select All or Select None to include or exclude all jobs in the order. (This button is active only after a job has been added to the order.)
- **Add Item** to Add items to the jobs. Refer to “Adding Items to Jobs” on page 67.
- **Edit Item** to modify a line item on the job.
- **Delete Item** to delete the selected line item from the job.
- **Rollback Item** to undo the last deletion.
- **Save As >>** to save the job as a shop job.
- **Parts & Labor/Catalogs >>** to add items to the job using the Catalog Viewer

3. When finished editing the job, click **Close**.

Removing Hazardous Materials or Shop Supply Charges

On the **Job** window, clear the **Hazmat** or **Supplies** check box.



Adding Discounts

Parts, labor, sublet, and miscellaneous charges are discounted directly on a job window. **Note:** You can also apply parts discounts based on customer type, or create a discounted labor rate.

To discount items on a Job:

1. On the **Edit Job** window, click the **Discount** button.



Result: The **Apply Discount** dialog box is displayed.

 A screenshot of the "Apply Discount" dialog box. The dialog has a title bar with "Apply Discount" and a close button. It contains several sections:

- Existing Discount:** \$0.00
- Parts:** Subtotal: \$230.00; Discount: 0.00 (with radio buttons for \$ and %); Discounted Amount: \$0.00
- Labor and Misc:** Subtotal: \$350.00; Discount: 0.00 (with radio buttons for \$ and %); Discounted Amount: \$0.00
- Sublet:** Subtotal: \$108.00; Discount: 0.00 (with radio buttons for \$ and %); Discounted Amount: \$0.00
- Discount Total:** \$0.00
- At the bottom, there is a help icon (question mark in a square), an "OK" button, and a "Cancel" button.

2. In the Parts, Labor and Misc, and Sublet sections, select either the **%** percentage or **\$** dollar option and enter the amount of the discount.

Result: The total discounts are calculated and displayed.

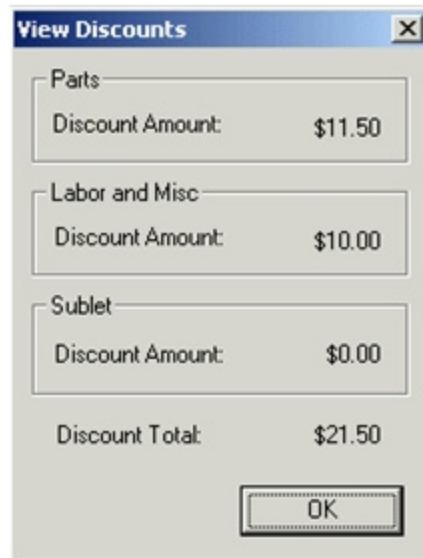
3. Click the **OK** button.

To View a discount on an order:

1. On the order form, click the **View Discount** button.



Result: The **View Discounts** dialog box displays the calculated total discounts.



2. Click **OK** to return to the order window.

Revising Repair Orders

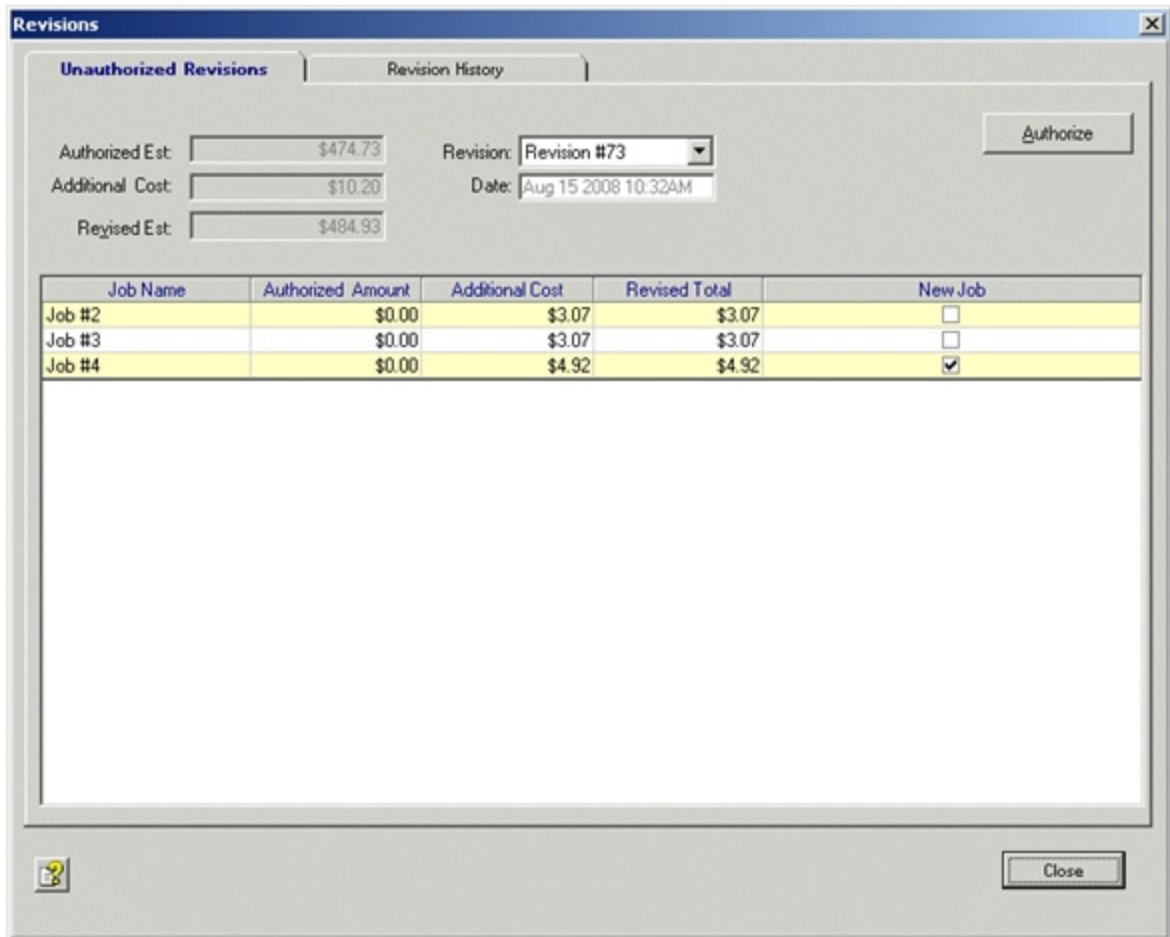
If, after saving an estimate as a repair order, you make changes that increase the total repair cost the **Revisions** button is enabled.

To Revise a Repair Order

1. Open the saved repair order.
2. Enter changes by:
 - Adding new jobs to the repair order. (See "Creating Jobs" on page 59.)
 - Selecting additional jobs to include in the order using the job line item check boxes.
 - Edit jobs. (See "Editing Jobs and Items" on page 78.)

Result: If the changes increase the total repair cost the order revision totals are updated and the **Revisions** button is enabled.

- Click the **Revisions** button.
Result: A **Revisions** window displays.



- The **New Job** boxes indicate which jobs are new.

5. Verify the revision information and click **Authorize**.

Result: The **Authorize Revision** box displays.

Authorize Revision

Revision Details

Original Estimate: \$1,127.61

Additional Cost: \$121.06

Revised Estimate: \$1,248.67

Authorized By: No Name Given

Phone # Called: No Phone Given

Date: 01/24/2008 3:39 PM

Reason:

In Person

Submit Cancel

6. Type the authorization information (**Authorized By, Phone # Called, Date** and **Reason**) and select the **In Person** check box if the authorization was in person.
7. Click the **Submit** button.

Result: The authorization information is saved to the database and you are returned to the order window.

To Review the Revision History

1. From the **Revisions** window, click on the **Revision History** tab.

Result: The **Revision History** tab displays.

The screenshot shows the 'Revisions' window with the 'Revision History' tab selected. The window contains the following information:

- Revision:** Revision #73
- Authorized Est.:** \$474.73
- Additional Cost:** \$10.20
- Revised Est.:** \$484.93
- Authorized By:** No Name Given
- Phone #:** No Phone Given
- Date:** 8/15/2008 10:47:10 AM
- In Person:**
- Original Order:** \$474.73
- Reason For Revision:** (Empty text area)

Job Name	Authorized Amount	Additional Cost	Revised Total	New Job
Job #2	\$0.00	\$3.07	\$3.07	<input type="checkbox"/>
Job #3	\$0.00	\$3.07	\$3.07	<input type="checkbox"/>
Job #4	\$0.00	\$4.92	\$4.92	<input checked="" type="checkbox"/>

At the bottom right of the window is a 'Close' button.

2. When you are done authorizing revisions, click **Close** to return to the order window.

Chapter 8: Catalogs

Manage includes a Catalog Viewer that allows you to access configured ALLDATA compatible aftermarket parts catalogs and an interface to the **WorldPac** application and catalog.

Adding Parts to Jobs from the Catalog Viewer

The Catalog Viewer allows you to access configured ALLDATA compatible aftermarket parts catalogs. Once you have a catalog configured in the Catalog Setup screen, the Catalog Viewer allows you to search and select items from the catalogs to add to the order.

To Use the Catalog Viewer window:

1. From the button bar on an Order or Job window, click **Parts & Labor/Catalogs >>**.



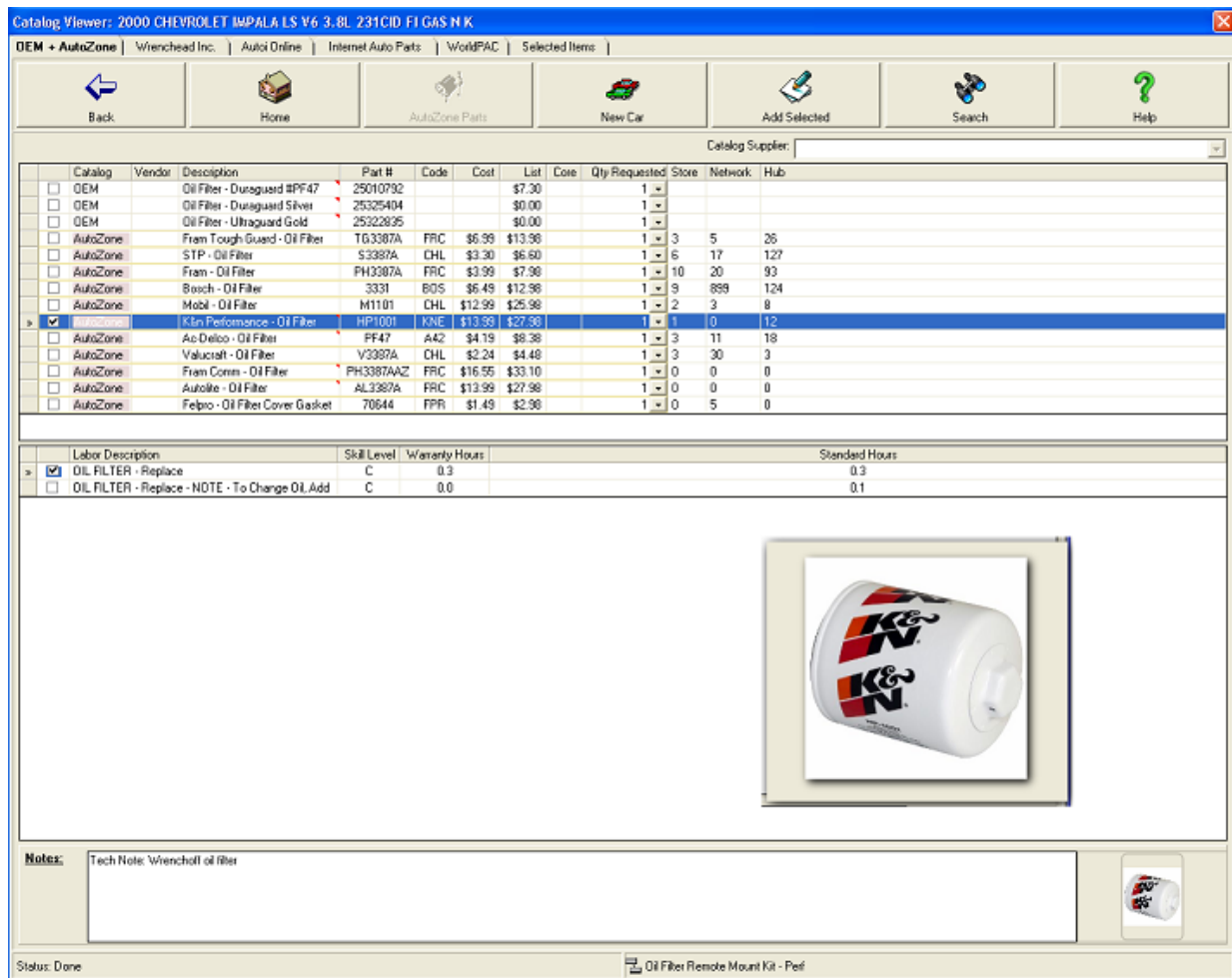
Result: The following catalog Tab options are display: OEM Parts & Labor, AutoZone Catalog, configured AfterMarket Parts Catalogs and if installed, WorldPac.

2. Select **Parts & Labor/ Catalog**.

Result: If a vehicle is already selected the Catalog Viewer displays with a list of components.

If a vehicle has NOT been selected or if the vehicle cannot be mapped in the catalog, you must select a vehicle. From the **Select Vehicle YMME** list select a vehicle and the list of components displays.

- Navigate the list of components (i.e. Engine, Cooling and Exhaust) to the basic component level (i.e. Oil Filter).



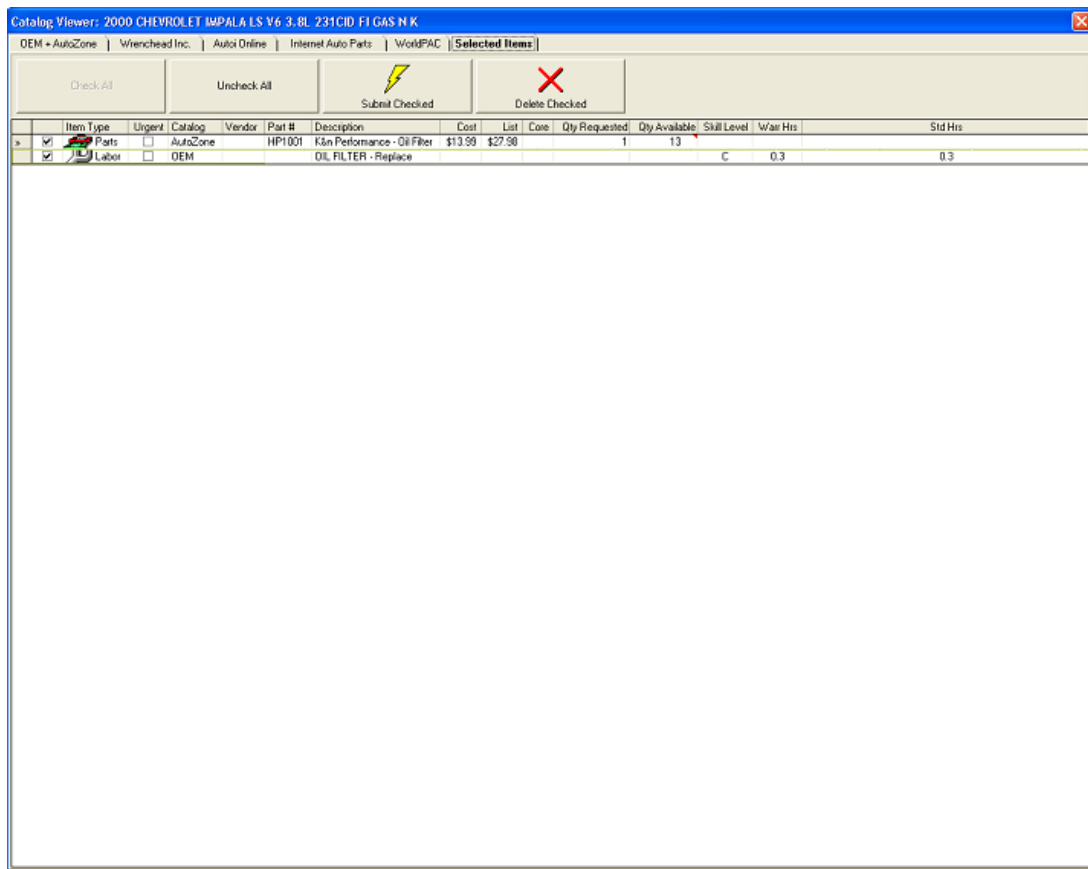
Note: The AutoZone Catalog Navigation system may prompt you again to select YMME information.

Result: The Part section is populated with Part items from the ALLDATA OEM Parts & Labor and the AutoZone catalog

Note: If the **Enable Automatic Mapping of OEM Parts to AutoZone Parts** option is not selected, use the AutoZone Parts button to search for mapped AutoZone Parts as needed.

- Use the check boxes to select part and labor line items.
- Use the **Add Selected** button to add the selected items to the Selected Line Items tab.

7. Click the **Selected Line items** tab to view the list of selected items.



8. Verify that the appropriate Part and Labor items are included on the list.
9. When the **Selected Line Item** list is complete and the items to go on the order are checked, click **Submit Checked**.

Result: If you have selected a part that is in the Parts table with a different price than the catalog price and if the part has the Price Override option selected, the **Price Override Parts** dialog box displays. In this case, select which price (catalog or Parts table price) to use for the retail price on this Job and click **Submit**.

Result: The items are added to the job and the **Job** window is displayed.

Checking the Price and Availability of Parts selected from the AfterMarket Catalogs

1. When a quote, estimate, or repair order contains aftermarket parts, select the **After-market Parts View** tab.

Result: The Aftermarket Parts View tab displays a list of the aftermarket parts on the order.

Note: OE parts are not listed and can not be electronically checked for pricing and availability.

The screenshot shows the 'Estimate: 260' window in the ALLDATA MANAGE software. The 'Aftermarket Parts View' tab is active. The main area displays a table with one part: K&N Performance - Oil Filter (Part Number HP1001). The table columns are Qty Requested (1), Qty Available (13), Qty Ordered, Catalog (AutoZone), Vendor, Part Number, Description, and Confirmation #. Below the table are buttons for 'Stock Check' and 'Order Parts'. On the right, the 'Line Item Totals By Type' panel shows: Parts: \$41.97, Labor: \$0.00, Sublet: \$0.00, Misc: \$0.00, Subtotal: \$41.97. Below that, a 'View Discounts' panel shows: View Discounts: \$0.00, Hazmat: \$2.00, Supplies: \$3.36, Tax: \$3.51, Total: \$50.84. The bottom of the window has buttons for 'Save', 'Save as RO', 'Save as Appointment', 'Repair Information', 'Disclaimers', 'Customer Follow-up', 'Take Deposit', 'Post', 'Print', and 'Close'.

2. Click **Stock Check**.

Result: A request is sent to the appropriate vendor/s and displays current cost and availability information for the parts.

Note: A Window may appear if the cost or availability has changed, make selection. This function is not available in Quote, must be saved as a RO

3. Click **Order Parts**.

Result: A request is sent to the appropriate vendor/s and displays order information for the parts.

Note: A Window may appear if the cost or availability has changed, make selection

Result: The new cost information is reflected in the Cost field for each part checked.

Note: The check mark on the parts that have been ordered will be grayed and cannot be ordered a second time. This function is not available in Quote, must be saved as a RO

Adding Parts to Jobs from the OEM and AfterMarket Catalogs

The Catalog viewer allows you to search and select items from the available catalogs to add to the order.

Once an order has a Job assigned, the Catalog viewer accessed from:

- Order windows - Parts & Labor/Catalogs button
- Job windows - Parts & Labor/Catalogs button

To Access the Catalogs from an Order window

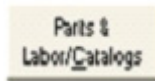
1. From the button bar on an Order window, click **Parts & Labor/ Catalogs**.



Result: The following catalog tab options display: OEM Parts & Labor with AutoZone Catalog, configured Aftermarket parts Catalogs and Selected Items

To Access Catalogs from a Job window

1. From the button bar on a job window, click **Parts & Labor/Catalogs**.



Result: The following catalog tab options display: OEM Parts & Labor with AutoZone Catalog, configured Aftermarket parts Catalogs and Selected Items

Note: The navigation of the configurable catalogs will be the same as going directly to the website

Example:

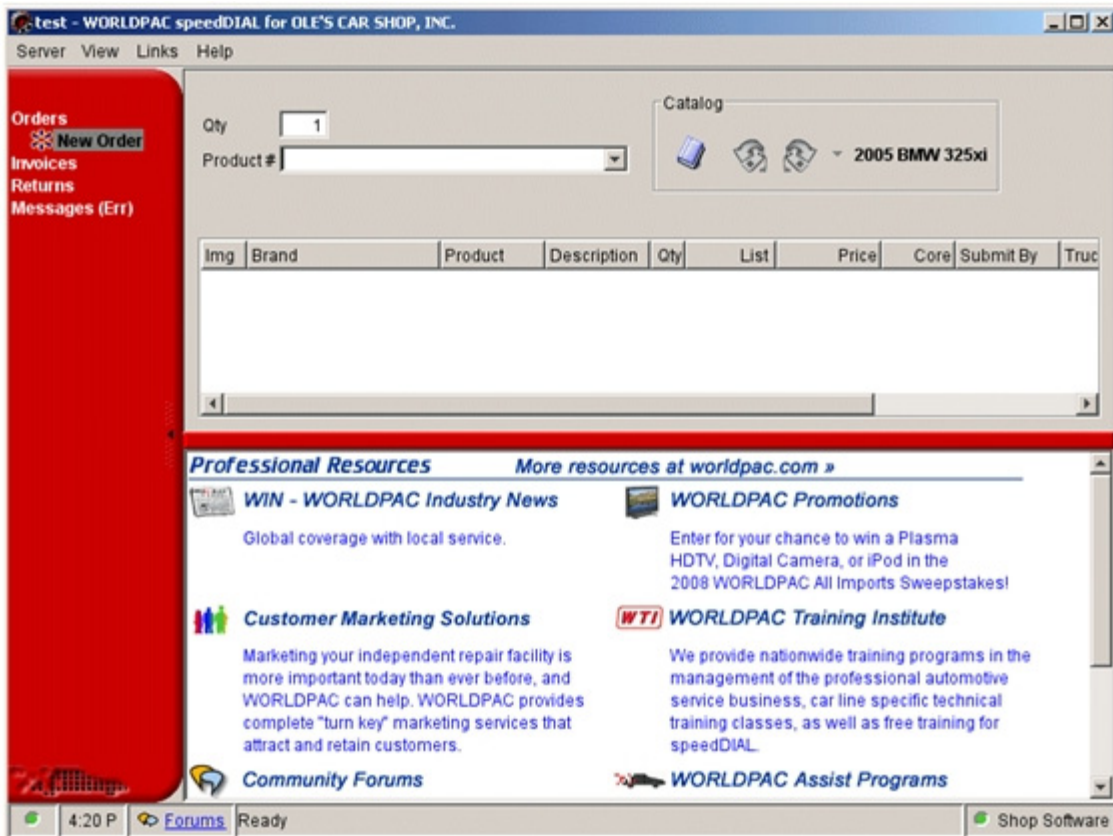
2. Select **WorldPac**.

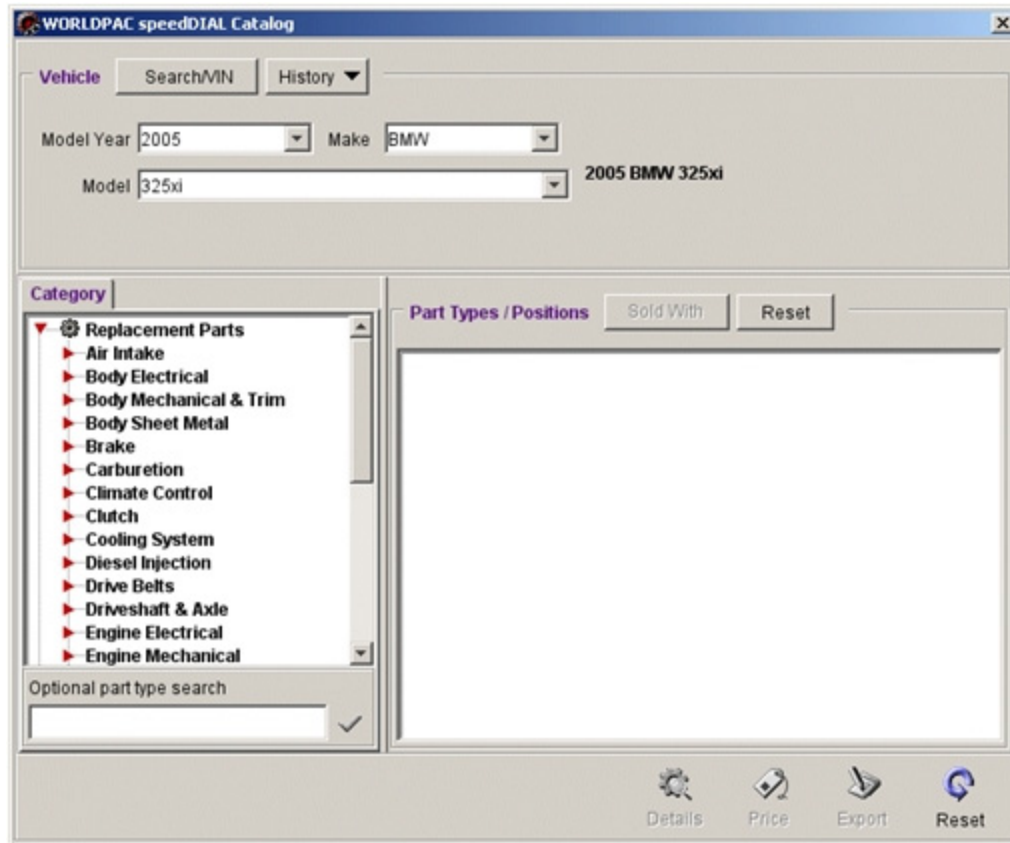
Result: The WorldPac application displays in a browser window.

WorldPac Browser window

To Use the WorldPac Browser window:

The WorldPac application displays in a browser window and when accessed from Manage the WorldPac Catalog displays in a separate browser window:





Note: For information about using the WorldPac application, refer to the WorldPac tutorial by selecting **Links > Tutorial** from the WorldPac browser menu bar.

3. If necessary, select the vehicle using either the **Search/VIN** or **History** button.
4. Use the **Category** and **Part Types** list to search the catalog for parts.
5. Locate the part, check the price, view details and click **Export**.
Result: The confirmation box displays for each part Selected.
6. Click **OK** on each confirmation box to add the new part to the Selected Items screen

- Click Submit Checked to add the new part to the order.

Result: If there is more than one job on the order;

The **Distribute selected items across the jobs** window displays.

Assign Parts/Labors to One Job

Select the Job

Assign Parts/Labors across multiple Jobs

Type	Description	Job	Job Description
Part	Kelly Springfield - Hose	Brake Pads	Replace front brake pads
Part	Dayco - Hose	Brake Pads	Replace front brake pads
Part	Kelly Springfield - Hose	Brake Pads	Replace front brake pads

- If all of the parts are to be added to the same job, select the Job from the drop down and select Apply.
- If the parts are to be added to more than one job, click in the job column for one of the parts in the grid.
- Select a Job from the drop-list.
- Repeat steps 9 and 10 as appropriate.
- Click **Submit**.

Result: The original Job window displays with the new parts listed.

Chapter 9: Documenting, Closing and Posting Orders

Adding Actuals and Details

Keeping track of actual costs and comparing them to what was actually billed can help you manage your shop more efficiently.

After a service is provided, but before the order is cashiered or posted, you can edit the Line Item to include:

- a note in the **Work Performed** field on labor, sublet and miscellaneous line items.
- the actual labor hours in the **Flagged Hrs** field on labor line items.
- the cost in the **Actual Cost** field on part, sublet and miscellaneous line items.

Applying Deposits

1. On the repair order, click **Take Deposit...** button.



Result: An **Apply Payment** window is displayed.

Apply Payment: Order 35

Payment #	Date	Type	Ref. Number	Authorization	Deposit	Amount

Status: Applying Payments

RD Total: \$68.42
 Amount Received: \$0.00
 Balance Due: \$68.42

New Payment

Payment Type:

Payment Date:

Payment Amount:

Print Receipt

2. From the **Payment Type** drop-list, select **Cash, Credit Card, Check, Debit, or Other**.
3. Enter any options to go with the payment type (i.e. check number, authorization number, credit card type, expiration date, etc.).
4. From the **Payment Date** drop-calendar, select the date of payment. It defaults to the current date.
5. In the **Payment Amount** field, type the amount of the deposit.
6. Click to check **Print Receipt** to print a receipt when the window is closed.
7. Click **Apply**.
Result: The deposit is reflected in the **Amount Received** and **Balance Due** fields.
8. Click **Close** when you are finished.
Result: The Apply Payment window closes.
Note: When **Print Receipt** is selected (see above), the receipt is displayed and can be printed. The Amount Paid and the Balance Due are reflected at the bottom of the receipt. If **Print Receipt** is not selected, the repair order is displayed.

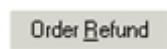
Applying Refunds

If an order is changed in such a way as to decrease the total to a value below the deposit accepted, a **Refund** dialog box is presented to allow for refunding the resulting overpayment.

If integrated accounting is activated the refund information is sent to your QuickBooks application.

In addition, a **Refund** dialog box has been added to the Service History tab on the **Edit Customer** window.

1. From the **Customers** list, select a customer and click **Edit**.
2. On the **Edit Customer** window, select the **Service History** tab.
Result: All cashiered and posted invoices and counter orders for the customer are listed.
3. Select a posted invoice and click **Order Refund**.



Result: A **Refund** dialog box is displayed.

Invoice Details	
Customer:	Just home
Total Amount Paid:	\$425.59
Refunded Amount:	\$0.00
Overpayment Credit:	\$0.00
Total Minus Refunds:	\$425.59

Refund Type

Cash
 Check
 Credit Card

Refund Amount:

Submit Cancel

4. In the **Refund Type** area, select **Cash**, **Check**, or **Credit Card**.
5. If ManageSM is integrated with QuickBooks a field titled **Bank Account** displays. Select the account (from your QuickBooks Accounts list) from which to deduct the amount.
6. In the **Refund Amount** field enter the dollar amount of the refund.
7. Click **Submit**.

Result: If the refund type is Cash or Credit Card, the refund is applied to the customer record and when accounting integration is enabled, a *general journal entry* is sent to QuickBooks.

If the refund type is Check, the refund is applied to the customer record and when accounting integration is enabled, a *pending check* is written to the Registry in QuickBooks.

Applying Payments

Notes:

Deposits can be applied to repair orders, but repair orders must be converted to invoices before payments can be applied.

Do not forget to add Cost and Flagged Hours information for each line item on the invoice.

1. On the invoice or counter sale, click the **Cashier...** button.



Result: An **Apply Payment** window is displayed.

Payment #	Date	Type	Ref. Number	Authorization	Deposit	Amount
130	05/05/2006	Cash			<input checked="" type="checkbox"/>	\$11.80

Status: Applying Payments

Invoice Total: \$641.80
Amount Received: \$11.80
Balance Due: \$630.00

New Payment

Payment Type:

Payment Date:

Payment Amount:

Print Receipt

2. From the **Payment Type** drop-list, select **Cash**, **Credit Card**, **Check**, **Debit**, or **Other**.
3. Enter any options to go with the payment type (i.e. check number, authorization number, credit card type, expiration date, etc.)
4. From the **Payment Date** drop-calendar, select the date of payment. It defaults to the current date.
5. In the **Payment Amount** field, type the amount of the payment.

6. Click to check **Print Receipt** to print a receipt.
7. Click the **Apply** button.
Result: The payment amount is reflected in the **Amount Received** and **Balance Due** fields.
8. If a balance remains, click the **Close** button when you are finished.
Result: The Apply Payment window is closed and a reminder message about posting the invoice is displayed.
9. When an invoice is fully paid, the Apply Payment window closes and the reminder messages for printing the receipt and posting the invoice are displayed. If you choose not to post the invoice it will display on the Cashiered tab on the Work in Progress window.

Posting Invoices and Counter Sales

Invoices and Counter Sales should be cashiered before they are posted, otherwise the balance due will be applied to Accounts Receivable. Also, each line item should have actual costs information (Cost or Flg Hrs fields) entered before the invoice is posted.

To post an invoice or counter sale:

1. Open an invoice or counter sale and click **Cashier**.
2. Add any outstanding payments to the invoice and click **Apply**.
Result: When the invoice is successfully cashiered a message displays prompting you to Post the invoice.
Note: When an invoice is fully paid, the Apply Payment window closes and the reminder messages for printing the receipt and posting the invoice are displayed.
3. After an invoice has been cashiered, click **Post**.



Result:

If any item is lacking actual cost information and the **Display warning when posting an invoice if parts cost or labor cost is not entered** option is selected on the Setup tab of the Company Setup window, a warning message displays and allows you to cancel posting the invoice.

If there are declined Jobs (check box cleared) on the invoice a **Save Recommendation** dialog box displays allowing you to save the declined Jobs as recommendations for future orders and then the invoice is closed and sent to the Service History table.

Note: Counter Sales do not allow you to save declined Jobs as recommendations.

Chapter 10: Service History

Service History is a searchable history of all your posted and voided invoices and counter sales.

To access cashiered or posted invoices and counter sales in Service History:

1. From the **Main** shortcut bar, select **Service History**.
2. Use the **Filter By** drop-list to adjust the type of records displayed.
3. Use the **Search By** drop-list, to determine the column to search for the search by text and to sort in ascending order.
4. In the **Search By** text box, type the initial characters of the customer name, VIN, order number, license plate number or Vehicle year, make, model in the text box.

Result: The list is updated with only those items that match the Filter By selection and with the first match selected.

Status	Order Number	Date Posted	Customer	License	Vehicle	VIN	Total
Posted	14	5/24/2007	Credit, Eight	AAAAAHH	1996 HONDA CIVIC EX		\$529.43
Posted	9	2/1/2005	Credit, Eight	AAAAAHH	1996 HONDA CIVIC EX		\$129.70
Posted	15	5/24/2007	Credit, Five	6543357	1993 ISUZU AMIGO		\$714.10
Posted	16	5/24/2007	Credit, Four	YTRERTY	1990 GEO TRACKER		\$264.00
Posted	3	2/1/2005	Credit, Four	YTRERTY	1990 GEO TRACKER		\$256.20
Posted	7	2/1/2005	Credit, Six	3212354	1995 NISSAN 300ZX 2*2		\$222.45
Posted	4	5/24/2007	Credit, Three	326598563	1994 JEEP CHEROKEE COUNT...		\$565.20
Posted	5	5/24/2007	Credit, Two	5455124	1995 FORD CROWN VICTORIA ...		\$230.95
Posted	17	5/24/2007	Figg, Mia	MIASKAR	2002 HONDA CIVIC EX	Z12MSKJD11	\$78.24
Posted	13	5/24/2007	Figg, Mia	MIASKAR	2002 HONDA CIVIC EX		\$555.02
Posted	11	5/24/2007	Figg, Mia	MIASKAR	2002 HONDA CIVIC EX		\$8,505.25
Posted	12	5/24/2007	Figg, Mia	MIASKAR	2002 HONDA CIVIC EX		\$1,265.71
Posted	10	5/23/2007	Figg, Mia	MIASKAR	2002 HONDA CIVIC EX		\$306.20

Status: Done Record Count: 13

View Refresh

Close

5. Select an order and click **View** to open the order and view it in detail.

Result: The order displays. In the Order window the contents of the following fields can be edited:

- Mileage In
- Mileage Out
- Written By

6. Select a Job and click **Edit Job**.

Result: The **Edit Job History** window displays. In the Edit Job History window the contents of the following fields can be edited:

- Job Category or (when displayed) Service Schedule
- Assigned Technician

Chapter 11: Premium Features

- Accounting Integration
- AutoAdmin Appointment Imports
- Customer Follow-up Messages
- End of Day process, Reports
- Editable Payment Records
- Inventory Management
- Vendor Invoice Number on Repair Orders
- Job Category Maintenance feature
- Price Matrix
- Profit Margin Analysis
- Recommendations
- Scheduled Appointments
- Security Profiles

Accounting Integration

ManageSM is equipped to integrate with QuickBooks (United States or Canadian versions) to provide accounting information and tools for your shop. Certain tasks need to be completed in QuickBooks before Accounting can be integrated with Manage.

For complete details, [Click here](#) or go to www.alldata.com/manage/quickbooks_integration.

AutoAdmin Appointment Import

Manage can use the AutoAdmin utility to import appointment information on a scheduled basis from the MARKET web site.

The AutoAdmin utility program is installed on the server computer with Manage. This program is responsible for automatically running import and export tasks that are configured on the Setup tab of the Company Setup window (Refer to "Setting Setup Information" on page 20). For more information about the utility refer to "AutoAdmin Utility" on page 165.

Customer Follow-up Messages

Use this feature, when enabled, to manage follow-up messages that can be printed and mailed or sent via email to your customers under specific conditions, such as posting invoices or service specials.

MANAGE **Elite** includes default follow-up messages that cannot be deleted but that can be tailored to meet your shop's specific needs. These messages are intended to welcome customers, thank them for business, and remind them of scheduled and recommended services.

Customer Follow-up messages can be created and tailored using one of two formats:

- MANAGE Mail Merge
- MARKET Email

MANAGE Mail Merge

Manage provides templates that facilitate creating and editing Mail Merge letters using the Microsoft Word Mail Merge feature.

Note: Microsoft Word is required to be installed on your computer with Authentication certifications applied for macros before functions relating to Mail Merge templates can be accessed. These functions appear grayed-out when they are not available.

For details refer to "Creating and Processing Customer Follow-up Messages" on page 35 and "Setting Preferences" on page 22.

MARKET Email

When a valid MARKET Shop ID is entered in the **ShopWeb** settings field on the **Company Information, Setup** tab, Manage provides templates that facilitate creating and editing Market Email messages.

For details refer to "Creating and Processing Customer Follow-up Messages" on page 35 and "Setting Preferences" on page 22.

Integrating Customer Follow-up Data

Before integrating Customer Follow-up Data in your shop for the first time review the needed system settings and message setting procedures.

Note: If you are updating Manage software with an existing Customer Follow-up feature refer to "Integrating Existing Customer Follow-up Data with Updated Manage Software".

How to update System Settings for Customer Follow-up feature:

1. On the **Company Information, Setup** tab, enter the **Market Shop ID** in the **ShopWeb Settings** area. Refer to the procedure "Setting Setup Information" on page 20.
2. On the **Company Information, Preferences** tab, select **Market Email** or **MANAGE Mail** merge from the **Default Follow-up Format** box. Refer to the procedure "Setting Preferences" on page 22.
3. On the **Customer Follow-up window, Settings** tab edit the following supplied Customer Follow-up messages forms:
 - MANAGE Welcome Letter
 - MANAGE Thank You Letter
 - MANAGE Service Reminder Letter
 - MANAGE Recommendation Letter

For more information on how to edit these forms refer to the *Editing customer follow-up forms* procedure.

When editing these forms remember to update the Shop Owner Signature field to contain the name of the person who will sign these letters for your shop.

4. On the **Customer Follow-up** window, **Settings** tab, add additional Customer Follow-up messages forms as needed. Refer to the procedure "To create a Customer Follow-up Message form:" on page 41.

5. To send a follow-up email message or letter, refer to the procedure, "To access and process follow-up messages:" on page 36.

Integrating Existing Customer Follow-up Data with Updated Manage Software

If your shop has been using the Customer Follow-Up feature the database will retain the customer settings when the software is updated to the latest version.

Before adding new customers, access the **Company Information, Preferences** tab and select an option from the **Default Follow-up Format** box. Refer to the procedure "Setting Preferences" on page 22.

This setting will determine the default setting for new customers but if you change it while the database contains Follow-Up customer records, you will need to decide how to handle the existing customer records.

If you change:

- from **MANAGE Mail Merge** to **MARKET Email**, you will be asked "Should the Follow-up Format be set to Market Email for all customer records with a valid email address and currently set to MANAGE Mail Merge?"
- from **MARKET Email** to **MANAGE Mail Merge**, you will be asked "Should the Follow-up Format be set to MANAGE Mail Merge for all customer records currently set to Market Email?"

Answer **Yes** only if you want the changes made automatically. You can always change the customer settings on an individual basis.

If you are going to be using the MARKET Email format for the first time, update the following items:

1. On the **Company Information, Setup** tab, verify the Market Shop ID in the **ShopWeb Settings** area. Refer to the procedure "Setting Setup Information" on page 20.
2. On the **Customer Follow-up** window, **Settings** tab, edit the following supplied Customer Follow-up messages forms:
 - MANAGE Welcome Letter
 - MANAGE Thank You Letter
 - MANAGE Service Reminder Letter
 - MANAGE Recommendation Letter

For more information on how to edit these forms refer to the procedure "*To edit a Customer Follow-up Message form:*" on page 42.

Note: When editing these forms remember to update the Shop Owner Signature field to contain the name of the person who will sign these letters for your shop.

End Of Day Process, Reports

Manage is currently equipped to configure an End of Day process for handling the printing of selected reports on a daily basis.

To Select End of Day Reports:

Use the End of Day Reports section to select parameters and reports to print.

1. From the Setup menu, select **End of Day Setup**.

Result: The End of Day Reports section of the End of Day Setup window displays.

Print	Report Name	Report Type	Prompt	Last Printed
<input type="checkbox"/>	Customer Balance Due Statement	Customer	Customer Name	
<input type="checkbox"/>	Balance Due Statement for All	Customer	No Prompt	
<input type="checkbox"/>	Negative Customer Balances	Customer	No Prompt	
<input type="checkbox"/>	Customer Credit Balances	Customer	No Prompt	
<input type="checkbox"/>	Current Payments and Deposits	Customer	No Prompt	
<input type="checkbox"/>	Missed Appointments	Customer	Date Range	
<input checked="" type="checkbox"/>	Scheduled Appointments	Customer	Date Range	
<input type="checkbox"/>	Mailing Labels	Customer	No Prompt	
<input type="checkbox"/>	Normally Stocked Parts by Part Number	Inventory	No Prompt	
<input type="checkbox"/>	Normally Stocked Parts by Description	Inventory	No Prompt	
<input type="checkbox"/>	Normally Stocked Parts by Primary Vendor	Inventory	No Prompt	
<input type="checkbox"/>	Normally Stocked Parts on Order by Vendor	Inventory	No Prompt	
<input type="checkbox"/>	Not Normally Stocked Parts by Part Number	Inventory	No Prompt	
<input type="checkbox"/>	Not Normally Stocked Parts by Description	Inventory	No Prompt	
<input type="checkbox"/>	Normally Stocked Parts by Bin Location	Inventory	No Prompt	
<input type="checkbox"/>	Profit by Order for Parts and Labor	Profit/Efficiency	Date Range	
<input type="checkbox"/>	Job Profit by Order	Profit/Efficiency	Date Range	
<input checked="" type="checkbox"/>	Sales Profit by Technician	Profit/Efficiency	Date Range	
<input type="checkbox"/>	Job Profit by Job Type	Profit/Efficiency	Date Range	

2. In the **Date Range** area, use the drop-down calendars to select the From and To dates to include in the reports.

Note: The default **From** date defaults to the last **To** date saved.

3. In the **Filter** area, use the Show Selected or Show All option buttons to determine the reports shown in the list.

4. In the list area, use the **Print** option boxes or the **Select All** button to select the reports to print.

Note: Selections are saved when you click **Submit**.

5. Use the **Print** button to start printing the reports selected.
Result: The name of the report that is printing displays in the status bar at the bottom of the window.
6. Click **Submit** to save the list of reports selected and close the window.

Editable Payment Records

When the Edit Payment Records feature is enabled payments can be edited at any time before the order is posted and saved to history.

Note: When Manage is integrated with QuickBooks, posted invoices cannot be edited. When Manage is integrated with QuickBooks 2005 or lower, deposits cannot be edited.

To edit a payment:

1. From the **Work in Progress** or **Cashiered** tab on the **Work in Progress** window, select a repair order or invoice and double-click on the order.
Result: The order window displays.
2. From the order or invoice, click **Take Deposit** or **Cashier**.
Result: The **Apply Payment** window displays.
3. Select a payment and click the **Edit Payment** button.
Result: The Edit Payment window displays with the EDIT MODE status bar flashing.
4. Change the Payment Type, Payment Date, or Payment Amount and click **Save**.
Result: The payment changes are applied and the View Payments window displays.
5. Click **Close**.
Result: The order window displays.

Inventory

Manage provides inventory functionality by allowing you to:

- store and update part information in a database table
- search and filter parts records
- add part information to the table from data entry windows or from the Catalog Viewer
- add part information to jobs from data entry windows, from the Parts table, or from the Catalog Viewer
- store inventory information in the Parts table including Bin Location
- store information about vendors
- create and track purchase orders
- report on part usage and purchases

Purchase Orders

You can add purchase orders to your database so that you can track parts orders and inventory.

To create a purchase order:

1. From the **Inventory** shortcut bar, select **Purchase Orders**.

Result: The list of existing purchase orders displays.

Status	PO Number	Vendor	Date Created /	Date Expected	Date Closed	Order Total
Closed	2	Family Chrysler	2/9/2006 8:01:00 PM		2/9/2006 8:03:17 PM	\$200.00
Voided	3	AutoZone 5293	3/22/2006 3:03:38 PM			\$333.28
Partially Received	4	AutoZone 5293	4/28/2006 3:06:24 PM			\$904.55
Received	5	AutoZone 5293	4/28/2006 5:55:01 PM			\$12.00
Closed	6	AutoZone 5293	5/10/2006 3:29:36 PM		5/10/2006 3:32:28 PM	\$15.95
Closed	7	AutoZone 5293	5/10/2006 3:33:28 PM		5/10/2006 3:37:33 PM	\$9.57
Closed	8	AutoZone 5293	5/10/2006 3:39:16 PM		5/10/2006 3:42:43 PM	\$9.57
Received	9	AutoZone 5293	5/10/2006 3:43:32 PM			\$8.97
Received	10	AutoZone 5293	1/10/2007 11:12:54 AM			\$38.00
Closed	11	AutoZone 5293	1/10/2007 11:14:52 AM		1/10/2007 12:53:30 PM	\$104.28
Closed	12	AutoZone 5293	1/10/2007 11:16:37 AM		1/10/2007 11:17:38 AM	\$343.57
Partially Received	13	American Tire	1/10/2007 11:18:04 AM			\$90.00
Open	14	AutoZone 5293	2/16/2007 12:35:00 PM			\$236.86
Closed	15	Joeys Parts for Cars	5/2/2007 12:24:35 PM		5/2/2007 12:32:56 PM	\$111.88
Open	16	Academy Auto Parts	5/23/2007 2:00:42 PM			\$455.62

Status: Done Record Count: 15

2. Click **New**.

Result: The **New Purchase Order** window displays with the following fields pre-filled:

- Order Status
- Date Created

MANAGE

File View Reports Setup Window Help

Main

Scheduling

Inventory

Purchase Orders

Vendors

Parts

Vendor: Name: Auto Zone Contact: Carey Business Phone: (916) 555-1212 Ext:

Order Status: OPEN Date Created: 11/12/2007 09:14 AM Date Expected: Not Specified Date Closed:

Restock Parts List Parts/Catalogs New Item Add Item to Parts List Delete Rollback

Part Source	Vendor	Item Number	Item Description	Cost	Qty Ordered	Total	Qty To Receive	Qty Received	Received...
Active		17252	DURALAST_IMPORT - STARTER...	\$93.99	1.00	\$93.99	1.00	0.00	\$0.00

Record Count: 1 Total Qty Ordered: 1 Order Total: 93.93 Total Qty Received: 0 Received Total: 0.00

Select All Receive Close PO Print Close

ALLDATA Setup

3. Click **Vendor** to open the Vendor Selection window.
4. If necessary create a vendor record and select it or select an existing vendor from the Vendors list.
5. Select the source for the parts that you want to add to the order using the following buttons:
 - **Restock** - All normally stocked parts whose stocked level is less than the recommended level are added to the order.
 - **Parts List** - The Part Selection list displays allowing you to search and select items from the Parts database records to add to the order.
 - **Parts/Catalogs** - The Catalog Viewer opens allowing you to search and select items from the aftermarket parts catalogs to add to the order.
 - **New Item** - The New Part window opens, allowing you to enter part information to add to the order.

- **Add Item to Parts List** - Adds the currently selected item to the Parts List.
6. If necessary use the following buttons to change the selected items:
- **Delete** - Remove the selected item from the purchase order.
 - **Rollback** - Undo the deletion of line items.
7. The following information is displayed in the grid section of the window:

Column	Description
Item Number	The part number from the parts list or the Aftermarket Parts catalog.
Item Description	A description of the part.
Cost	The vendor's list price of one part.
Qty Ordered	The number of the items on the order.
Total	The total cost of the quantity on the order.
Qty to Receive	The number of items to be processed as received.
Qty Received	The number of items flagged as received.
Received Total	The total cost of the quantity of items received.

8. The quantities can be changed by double-clicking in the **Qty Ordered** field for the part.
Note: Decimal values are now allowed in quantity fields.
9. The following buttons can be used to perform the corresponding function:
- **Print** - Prints the Purchase Order.
 - **Close** - Saves the Purchase order, closes the Purchase Order window and displays the Purchase Order report.
- Note1:** Buttons are not activated if the criteria for the associated task are not met.
- Note2:** The Purchase Orders feature is only functional when the subscription includes Elite Features

To Receive Purchase Orders

1. From the **Inventory** shortcut bar, select **Purchase Orders**.

Result: The list of existing purchase orders displays.

Purchase Orders

Search By: Vendor Filter By: Show All

Status	PO Number	Vendor	Date Created /	Date Expected	Date Closed	Order Total
Closed	2	Family Chrysler	2/9/2006 8:01:00 PM		2/9/2006 8:03:17 PM	\$200.00
Voided	3	AutoZone 5293	3/22/2006 3:03:38 PM			\$333.28
Partially Received	4	AutoZone 5293	4/28/2006 3:06:24 PM			\$904.55
Received	5	AutoZone 5293	4/28/2006 5:55:01 PM			\$12.00
Closed	6	AutoZone 5293	5/10/2006 3:29:36 PM		5/10/2006 3:32:28 PM	\$15.95
Closed	7	AutoZone 5293	5/10/2006 3:33:28 PM		5/10/2006 3:37:33 PM	\$9.57
Closed	8	AutoZone 5293	5/10/2006 3:39:16 PM		5/10/2006 3:42:43 PM	\$9.57
Received	9	AutoZone 5293	5/10/2006 3:43:32 PM			\$8.97
Received	10	AutoZone 5293	1/10/2007 11:12:54 AM			\$38.00
Closed	11	AutoZone 5293	1/10/2007 11:14:52 AM		1/10/2007 12:53:30 PM	\$104.28
Closed	12	AutoZone 5293	1/10/2007 11:16:37 AM		1/10/2007 11:17:38 AM	\$343.57
Partially Received	13	American Tire	1/10/2007 11:18:04 AM			\$90.00
Open	14	AutoZone 5293	2/16/2007 12:35:00 PM			\$236.86
Closed	15	Joeys Parts for Cars	5/2/2007 12:24:35 PM		5/2/2007 12:32:56 PM	\$111.88
Open	16	Academy Auto Parts	5/23/2007 2:00:42 PM			\$455.62

Status: Done Record Count: 15

New Edit Void Refresh

Close

2. Select a Purchase Order from the list.

3. Click **Edit**.

Result: The **Edit Purchase Order** window displays.

MANAGE

File View Reports Setup Window Help

Main

Scheduling

Inventory

Purchase Orders

Vendors

Parts

Edit Purchase Order: 55

Vendor: Name: Auto Zone Contact: Carey Business Phone: (916) 555-1212 Ext:

Order Status: OPEN Date Created: 11/12/2007 09:14 AM Date Expected: Not Specified Date Closed:

Restock Parts List Parts Catalogs New Item Add Item to Parts List Delete Rollback

Part Source	Vendor	Item Number	Item Description	Cost	Qty Ordered	Total	Qty To Receive	Qty Received	Received Total
Achivent	17252	17252	DURALAST_IMPORT - STARTER...	\$99.99	1.00	\$99.99	1.00	0.00	\$0.00

Record Count: 1 Total Qty Ordered: 1 Order Total: 99.99 Total Qty Received: 0 Received Total: 0.00

Select All Receive Close PO Print Close

ALLDATA Setup

4. Using the check box, select a line item.

5. Click in the **Qty to Receive** field and select a quantity.

6. If appropriate over-type the cost.

7. Click **Receive**.

Result: The Inventory information is updated and the purchase order is refreshed.

8. After all items are received, click **Close PO**.9. Click **Close**.

Result: The **Edit Purchase Order** window closes.

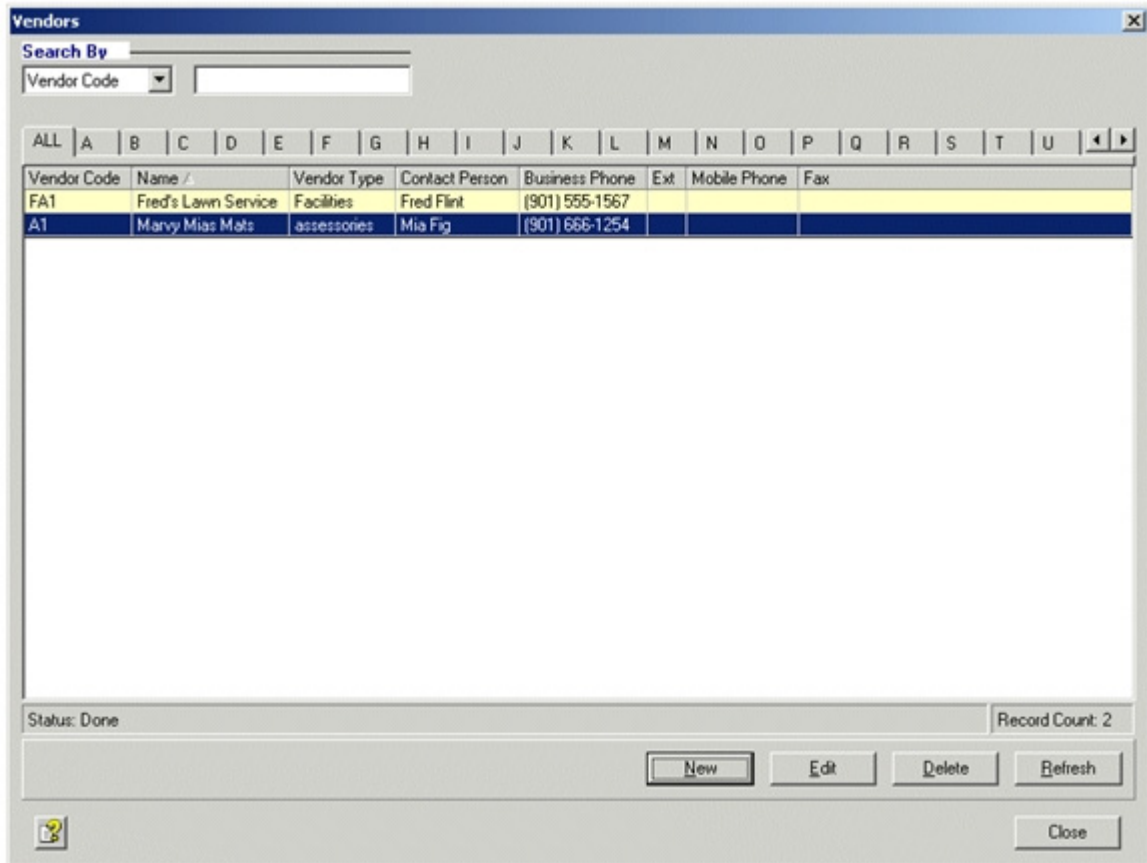
Vendors

The Vendors list displays the vendors (Sellers or wholesalers) of parts that you use and stock in the shop.

To Create a Vendor record:

1. From the **Inventory** shortcut bar, select **Vendors**.

Result: The list of existing Vendors displays.



2. Click **New**.

Result: The **New Vendor** window displays.

3. Enter the following information for the vendor:

Field name	Description
Vendor Name	Enter your vendors company name.
Vendor Code	Enter a descriptive code that you want to use to group vendors. This is a required field.
Vendor Type	Enter a descriptive type such as: aftermarket parts.
Purchase Limit	Enter you shop's purchase limit with this vendor.
Terms	Enter your shop's credit terms with this vendor.
Comments	Enter any comments that might be helpful when working with this vendor.
Contact Information	Type the contact's information (name, phones, FAX, and email) in the appropriate field (Contact Name, Business Phone, Ext, Mobile Phone, Business Fax, and Email Address).

Field name	Description
Local Address	Type the vendor's address information in the appropriate field (Postal Code, Street, City, and State/Province). Note: The City and State/Province fields are prefilled if the code entered in the postal code field is recognized by Manage.

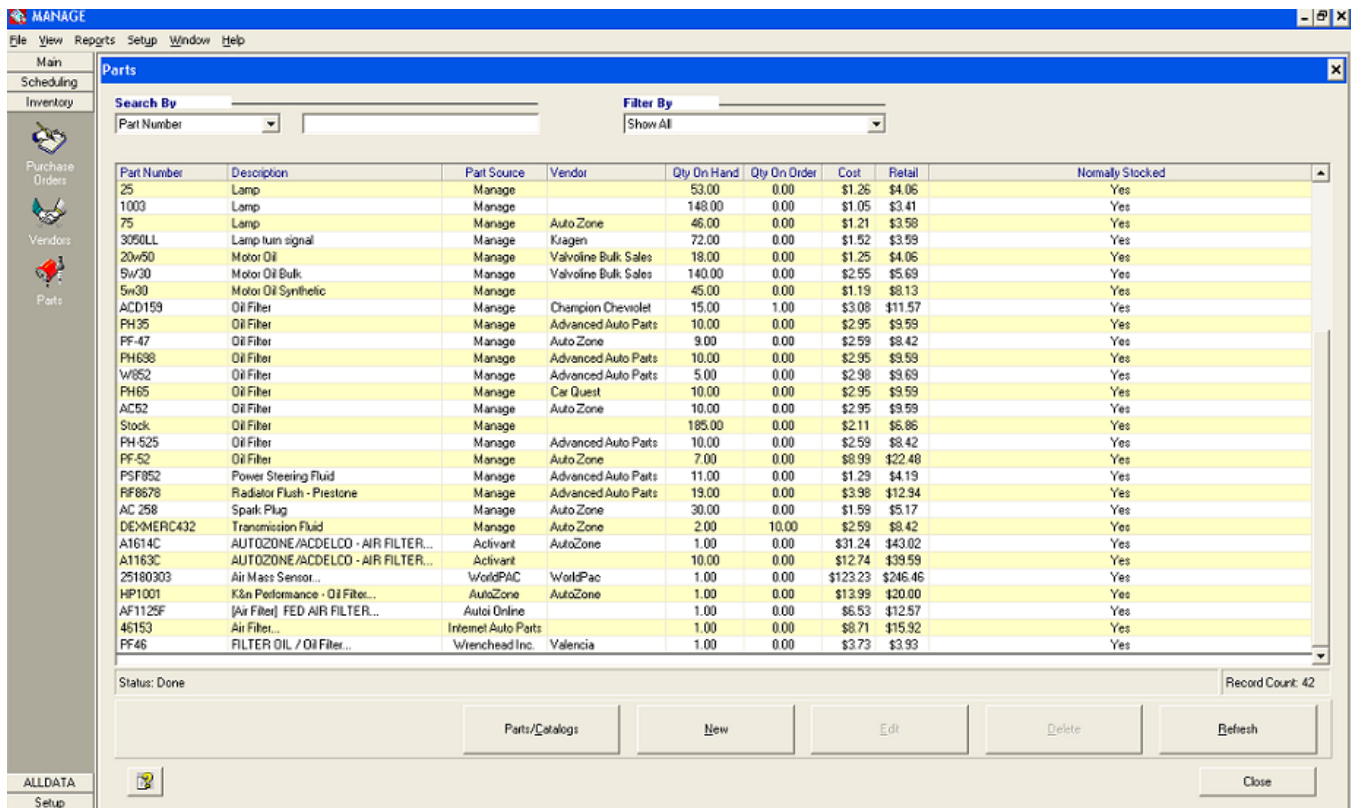
- The **Open Orders** grid is used, when editing vendor records, to list open orders assigned to the vendor.
- Click **Submit** to save the vendor record.
Note: The Vendors feature is only functional when the subscription includes Elite Features.

Parts

The parts database table stores and tracks parts used by your shop. These parts records are used to track inventory, to create restocking purchase orders, and to add to estimates, repair orders, and counter sales.

To add a part to the Parts list:

- From the **Inventory** shortcut bar, select **Parts**.
Result: A list of parts is displayed. The list is blank if no parts records have been created.



- From the **Parts** list, click the **New** button.

Result: A **New Part** window is displayed.

Note: The New Part window has been enhanced to populate the Part Number or Description field with information entered in the search fields on the Part list window.

- Complete the following fields:

Field Name	Input
Part information:	
Part #	The part number, as designated by the individual part manufacturer. This is a required field.
Description	The description of the part. Use the down arrow to access a list of common part descriptions.
Source	The origin (MANAGE entry, Aftermarket Parts catalog, or OEM) of the part information. This field cannot be edited.
Current Cost	The manufacturer suggested list price of one part. (Only displays when Normally Stocked is not selected)
Retail	When the Apply Markup flag is selected the retail price reflects the current cost plus the markup from the price matrix.
Qty On Hand	The current quantity of the normally stocked part. When an invoice or counter

Field Name	Input
	sale is posted, the Quantity On Hand values for all of the SC - user defined parts on that invoice or counter sale are decremented. When a PO is received, the Quantity On Hand value increments for all of the SC - user defined parts on that PO. (Only displays when Normally Stocked is selected)
Average Cost	<p>The average cost.</p> <p>When the Normally Stocked flag is selected this field displays a cost based on the average cost of the quantity in stock and on the average cost of the quantity received.</p> <p>This value is recalculated whenever the Quantity on Hand value is increased or when the Current Cost value changes on either a part record or on a purchase order.</p> <p>(Only displays when Normally Stocked is selected)</p>
Bin Location	<p>The location identifier. The identifier cannot be longer than 30 characters.</p> <p>Note: The Bin Location field is only enabled when the subscription includes Elite Features.</p>
Qty Committed	The quantity of the part selected on all open unposted repair orders (quantities on estimates are not included). (Only displays when Normally Stocked is selected)
Qty On Order	The quantity of the part currently on order. This quantity is updated automatically when purchase orders are updated.
Min Stocking Level	The minimum number of units kept in inventory. (Only displays when Normally Stocked is selected)
Max Stocking Level	The maximum number of units kept in inventory. (Only displays when Normally Stocked is selected)
Misc Inventory Flags:	
Normally Stocked	Indicator of whether the part is part of your shop's normal inventory.
Price Override	Indicator of whether the part is one that you want to be able to price differently than the Aftermarket Parts or OEM catalog.
Apply Markup	Indicator that the Markup Settings from the Company Setup table should be used to calculate the Retail charge above. Selecting this flag will trigger the recalculation of the Retail charge.
Vendors:	
Name	Vendor Name
Contact	Vendor contact name
Phone	Vendor Contact phone number
Ext.	Vendor Contact phone Extension
Superseded Part Information:	
Part #	The part number of the part that has been replaced with this part.
Description	The description of the part that has been replaced.
Qty On Hand	The quantity of the superseded part still on hand.

Note: Decimal values are now allowed in quantity fields.

4. Click the **Submit** button.

Note: The (Average Cost) or (Qty On Order) or (Min Stocking Level) or (Max Stocking Level) feature is only functional when the subscription includes Elite Features

To Create a Part Item from the Catalog:

1. From the **Parts** table click **Parts/Catalogs**.

Result: The **Select Vehicle YMME Description** window displays. Select a vehicle using the Year, Make, Model, and Engine lists and the Catalog Viewer displays with the OEM+AutoZone tab active.

2. Navigate the Catalog Viewer by selecting components (i.e. Brakes and Traction Control) and part types (i.e. Brake Pad). You may need to make additional selections such as clarifying the engine, or selecting rear or front, or left or right.

Result: The Part item section is populated with Part items from the ALLDATA catalog (OEM) or from the AutoZone Parts catalog. All Configured Aftermarket parts catalogs are also available for parts selection.

3. Use the check boxes to select part line items.

Note: Labor items should not be selected when accessing the Catalog Viewer from the Parts table.

4. Use the **Add Selected** button on the OEM+AutoZone screen to add items to the Selected Line Items tab. Use the appropriate method on other Aftermarket catalogs to add items to the Selected Line Items tab.

5. After the desired items are selected, you can click **Submit** to add the items to the job or click the **Selected Line items** tab to view the list of selected items.

6. Verify that the appropriate part items are included on the list.

7. Remove items from the list using the **Delete** button and add items by clicking the **Home** button to return to the selection process.

8. When the **Selected Line Item** list is complete and items are checked, click **Submit Checked**.

Result: The items are added to the Parts database table and the updated Parts list is displayed.

9. From the Job window, click **Close**.

Vendor Invoice Number on Repair Orders

Manage allows you to add a Vendor Invoice Number on the Edit Part Item window of a repair order.

To add a Vendor Invoice Number to Job window:

1. From a Repair Order window, choose the desired Job and click Edit Job.

Result: The Edit Job Window displays.

Edit Job: MARY MOCHA 2006 MERCEDES-BENZ CLS500 V8 5.0L 4966CC FI GAS N

Job Name	Category	Assigned Technician	Status
Oil Change - 5 qt	Maintenance	SAMMY SUBARU	

Description: Change Oil & Filter and Lube

Symptom:

Buttons: Select None, Add Item, Edit Item, Delete Item, Rollback Item, Save As >>, Parts & Labor/Catalogs

Type	Code	Description	Vendor	Qty/Hrs	Cost/Flg Hrs	Retail	Unit
✓ Labor	Rate 2	Change engine oil		0.75	0.75	\$70.00	...
✓ Part	00038	OIL 10W30		5.00	\$1.01	\$1.77	...
✓ Part	00037	OIL FILTER		1.00	\$3.33	\$5.83	...

Line Item Totals By Type

Parts:	\$14.68
Labor:	\$52.50
Sublet:	\$0.00
Misc:	\$0.00
Subtotal:	\$67.18

Fixed Price:

Discount: \$0.00

Hazmat: \$6.72

Supplies:

Total: \$73.90

Job Revision Totals

Authorized Est:	\$73.90
Additional Cost:	\$0.00
Revised Est:	\$73.90

Close

- From a **Job** window, select the part item and click **Edit Item**.

Result: The Edit Parts Items window opens.

The screenshot shows the 'Edit Part' window with the following details:

- Part ID:** 50851
- Description:** 02 SENSOR 268
- Qty:** 1.00
- Cost:** \$158.00
- Retail:** \$247.50
- Total:** \$247.50
- Options:** Tax Exempt, Update Parts List
- Vendor Invoice Number:** [Empty field]
- Vendor Information:**
 - Name: [Empty field]
 - Address 1: [Empty field]
 - Address 2: [Empty field]
 - City: [Empty field]
 - State/Prov: [Empty field], Postal Code: [Empty field]
 - Contact: [Empty field]
 - Phone: [Empty field], Ext: [Empty field], Fax: [Empty field]
 - Mobile: [Empty field]
- Inventory Information:**
 - Price Override
 - Normally Stocked
- Buttons:** Design, Edit, Preview, Close

- Update the Vendor Invoice Number field.
- Click **Close** to save and close the Edit Part window and click **Close** again to save and close the Edit Job window.

Note: The Vendors Invoice Number feature is only functional when the subscription includes Elite Features.

Job Category Maintenance

Manage provides a list of common job descriptions and allows you to add to the list. These Job Categories can be used when creating jobs.

In the Job Categories section of the Setup tab on the Company Setup window you can view the System Categories that are provided and you can add, modify, and delete additional categories. Refer to "Setting Setup Information" on page 20.

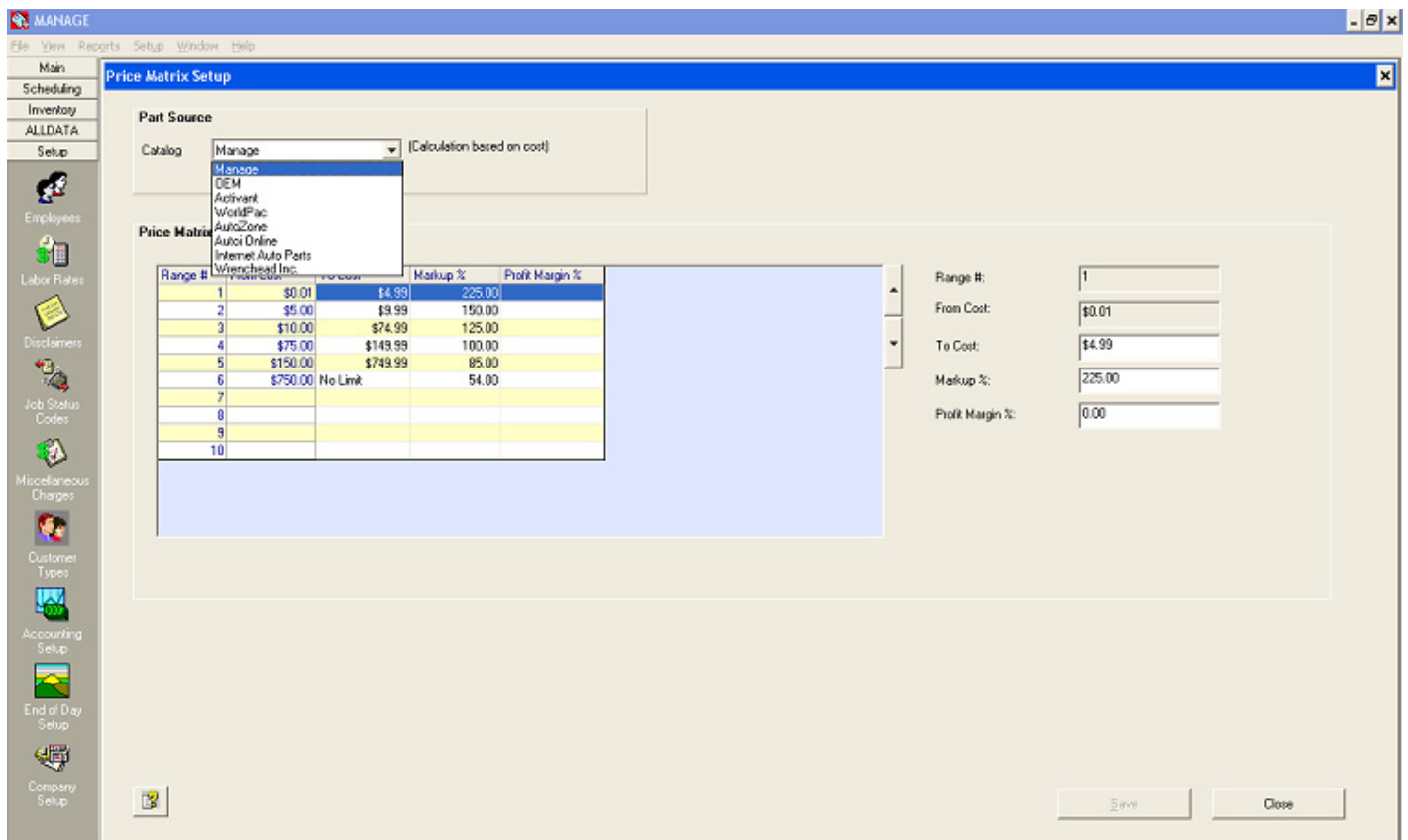
Price Matrix

The Price Matrix Setup window allows you to configure markup rules for parts based on their source. When you add parts to orders, the retail cost associated with the part is determined by this Price Matrix table.

To access the Price Matrix Setup:

1. From the **Setup** menu or shortcut bar, select **Company Setup**.
2. Select the **Tax/Markups** tab.
3. In the Markups section, click **Price Matrix Setup**.

Result: The **Price Matrix Setup** window displays.



4. Select the **Part Source** of the price matrix to be configured first:
 - MANAGE Parts (Calculation based on the cost)
 - OE Parts (OEM) (Calculation based on the suggested list price)
 - Activant Aftermarket Parts (Calculation based on the suggested list price)
 - WorldPac Aftermarket Parts (Calculation based on the cost)
 - AutoZone Aftermarket Parts (Calculation based on the cost)

- Autoi Aftermarket Parts (Calculation based on the cost)
 - IAP Aftermarket Parts (Calculation based on the cost)
 - WHI Solutions Aftermarket Parts (Calculation based on the cost)
 - WORLDPAAC Parts (Calculation based on the cost)
5. Update each **Range** in order:
- In the **From Cost** field, the next valid range lower limit is pre-filled.
 - In the **To Cost** field, enter an upper limit for the range.
 - Enter a percentage value in the **Markup %** or **Profit Margin %** field.
- Note: Only one percentage can be entered for a each range. If you try to enter a second percentage, the first percentage reverts to zero.
6. Use the up and down arrows on the window to move to the next available range.
7. Select the next **Part Source** to configure and update each range.
8. When the Price Matrix Setup information is correct, click **Save**.
- Note1:** If the Parts List has already been configured, saving the Price Matrix table updates the retail charges of items in the Parts List.
- Note2:** The Price Matrix feature with multiple ranges is only functional when the subscription includes Elite Features


Profit Margin Analysis

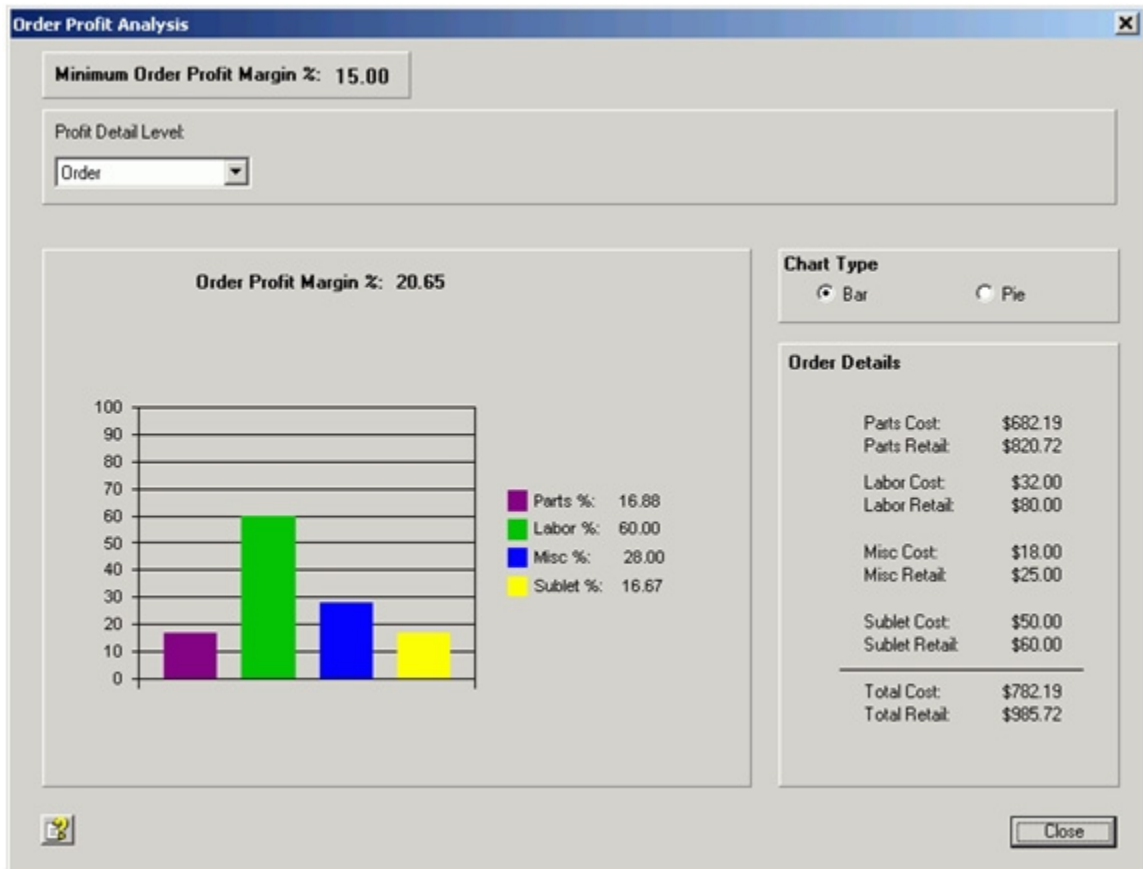
The Profit Margin window allows you to check the difference between the cost and the retail price of parts and services on orders, jobs, and line items.

When a job is added to an order Manage tests the profit margins against the configured Minimum Profit Margin Threshold and displays a Profit Margin indicator in the status bar. The indicator is green if the Profit Margin Threshold was met and red if the Profit Margin Threshold was not met.

The Minimum Profit Margin Threshold is configured on the Tax and Markups tab of the Company Setup window (refer to "Profit Margins" on page 16).

To view profit margins:

1. From an order or job window, click the Profit Margin  indicator in the status bar.
Note: The indicator always appears when jobs exist on the order.
Result: The **Order Profit Analysis** window displays.



2. The **Minimum Order Profit Margin** field displays the threshold value that was configured on the Tax and Markup tab of the Company Setup window.
3. In the **Profit Detail Level** drop-list, select Order, Job, or Line Item.
Note: When accessed from the Job window, only Job or Line Item are available.
4. If **Job** is selected in the **Profit Detail Level** field, select a Job description in the Job drop-list.
5. If **Line Item** is selected in the **Profit Detail Level** field, select a Job description in the Job drop-list and select a Line Item description in the Line Item drop-list.

6. Select the **Chart Type** (pie chart or bar chart) to select the type of chart to use in displaying the profit margin.

Result: The chart displays the profit margin information in the selected type of chart. The Profit Margins reflects the difference between the calculated cost and retail values of the parts, labor, sublet, or misc line items as reflected in the Order Job or Line Item Details table.

7. The calculated margin value displays in the Order, Job or Line Profit Margin field.
8. Verify the Order, Job or Line Item Details in the table.
9. Click **Close** to close the window and return to the order window.

Note: The Profit Margin Analysis feature is only functional when the subscription includes Elite Features.

Recommendations

Recommendations are jobs based on services and repairs that have been identified for a specific vehicle but have been declined and saved. The recommendations are stored as vehicle information and whenever the vehicle is selected on an order window the status bar displays an indicator and the number of recommendations for the vehicle. Use the Add Job From box to add the recommendations to the order.

Saving Recommendations: When Jobs on an order are not selected (the check box is cleared) and the order is posted, a Save Recommendations dialog box allows the declined jobs to be saved as recommendations. A date calculator determines the service date initially assigned to the recommendation.

Only declined jobs, not declined line items on jobs, become Recommendations. On declined jobs all the line items (whether they were selected or not) are added to the Recommendation.

After a recommendation has been saved, it can be edited and line items can be added, modified, or deleted.

New Recommendations: Recommendations can also be created from the General tab of the Edit Vehicle dialog box.

Adding Recommendations: When creating estimates Recommendation can be selected in the **Add Job >>** option box. When you click **Add Job >>** and **Recommendation**, the Recommendation Selection list displays.

Once a Recommendation has been selected and added to an order as a new job, it ceases to be an active Recommendation and is deleted from the database.

Scheduled Appointments

With Manage you can use the Appointments Calendar and the Appointments Listing to track and manage service appointments.

When you register your shop with the MARKET website, you provide customers the ability to enter customer information, select standard services, and schedule appointments for those services. Then you can use Manage to import those appointments from the internet to your Manage database.

In Manage you can use the information from the website to create, edit, and save customer, vehicle and job information. When creating new orders, you can use the Appointment button to save the order as an appointment.

Appointments can also be entered or edited directly in Manage from the Appointments List window.

The Appointments Calendar allows you to view your shop's appointments in a calendar format by month or week.

Viewing Appointments Calendar

1. From the **Scheduling** shortcut bar, select **Appointments Calendar**.

2. If appropriate, enter or select dates in the **Calendar From** and **Calendar To** fields to determine a date range to display.

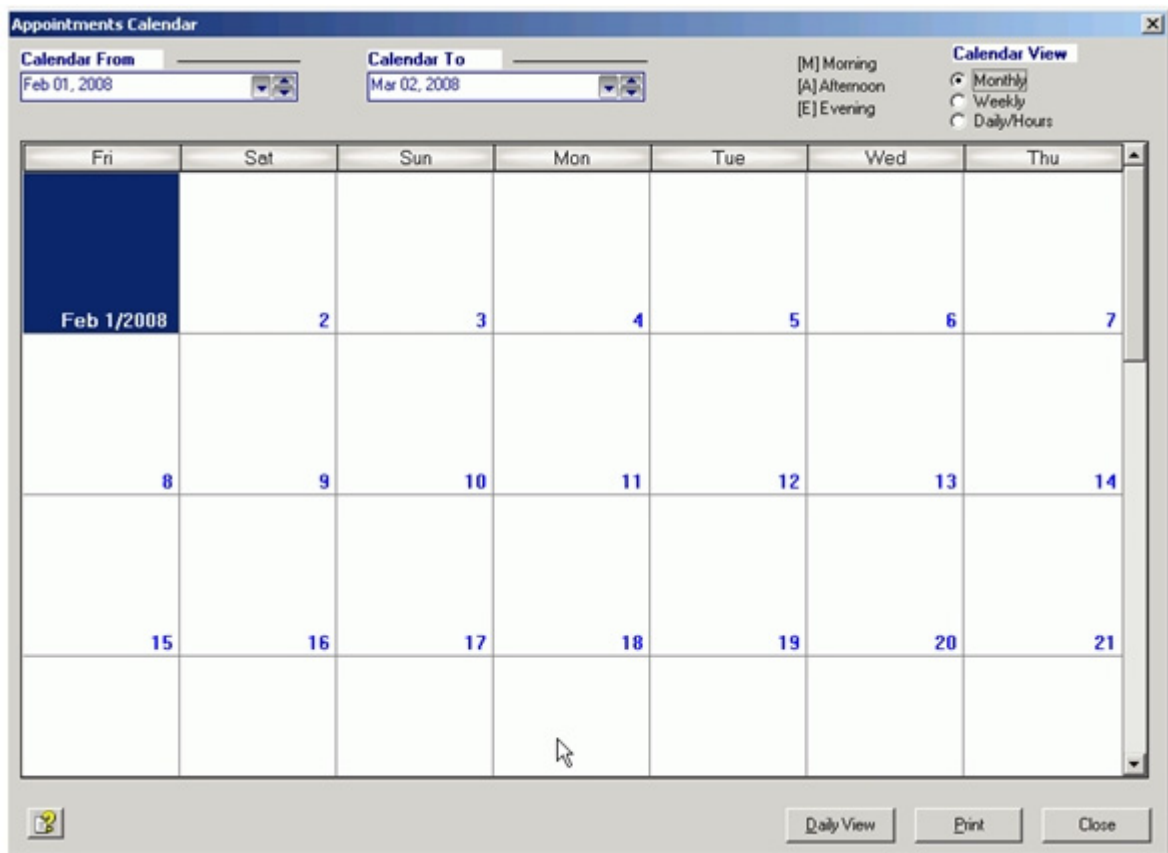
Note: The first column of the calendar monthly layout will depend on the Calendar From (starting) date. For example: if the Calendar From date is Feb 1, 2008, the first column of the monthly calendar displayed is Friday.

3. Use the Calendar View buttons to select the type of view displayed: Monthly, Weekly, or Daily/Hours layout.

Result: Depending on the view type selected, the corresponding grid displays:

- Monthly - the monthly layout
- Weekly - the weekly layout
- Daily/Hours - the daily/hours layout

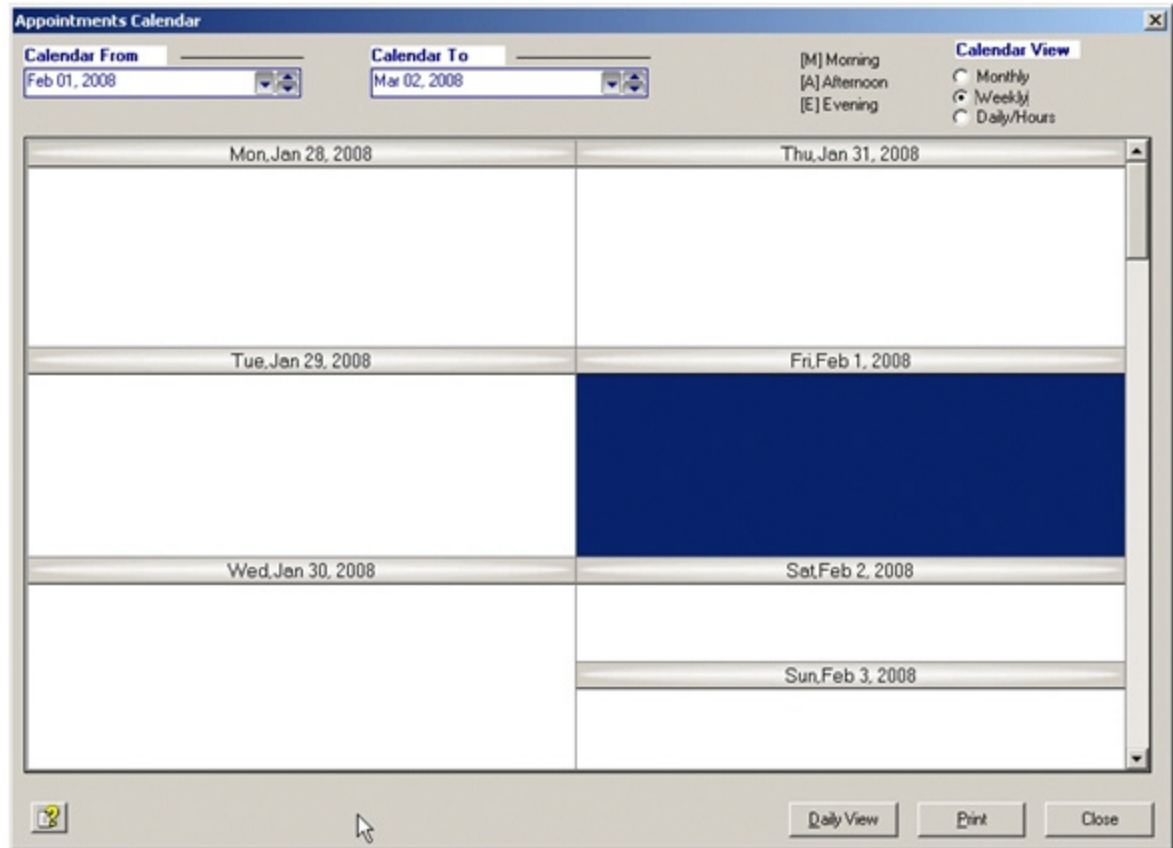
Appointment Calendar, Monthly view



The monthly calendar grid shows each day of the selected month with the customer name and time of day (M for morning and A for afternoon) listed in the corresponding box.

If you select a day box in the grid and click **Daily View**, the Appointment List for that day displays.

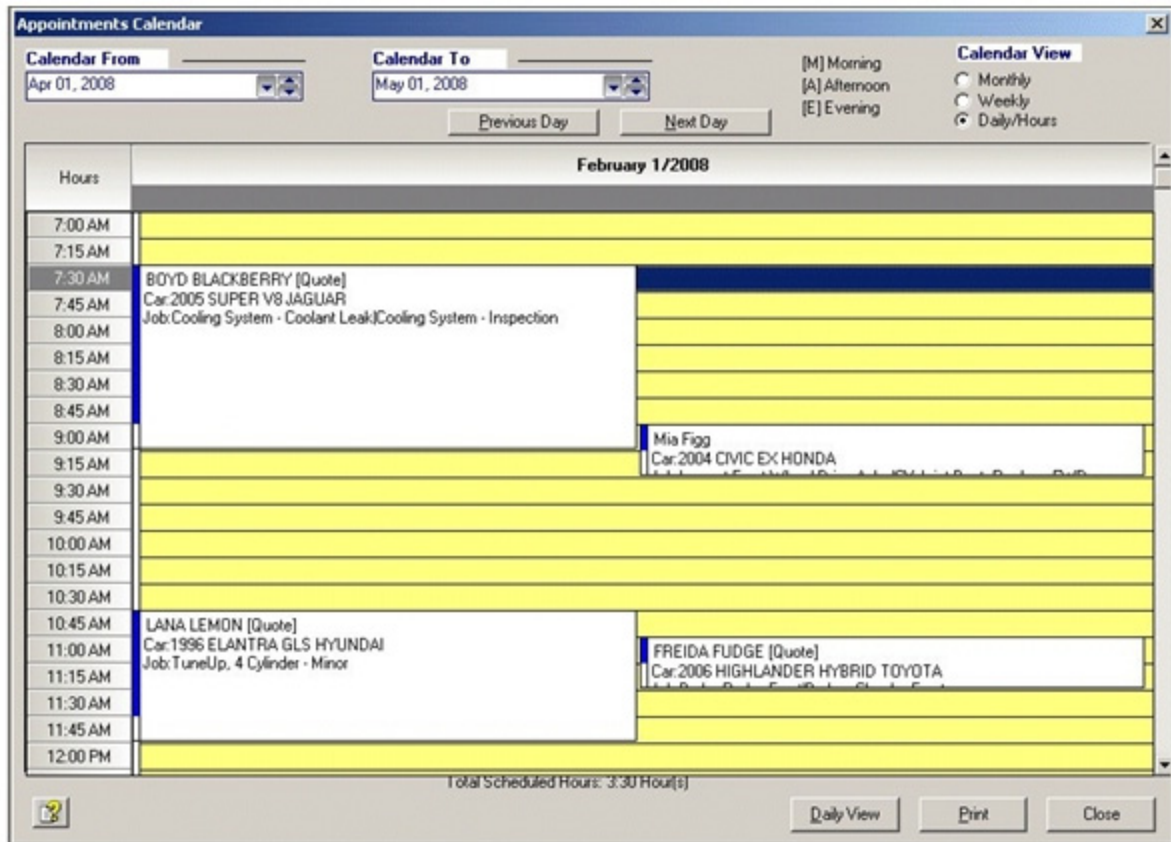
Appointment Calendar, Weekly view



The weekly calendar grid shows each day of the selected week with the customer name and time of day (M for morning and A for afternoon) listed in the corresponding box.

If you select a day box in the grid and click **Daily View**, the Appointment List for that day displays.

Appointment Calendar, Daily/Hourly view



The daily/hourly calendar grid shows each 15 minute intervals of the work day (from 7 am to 9 pm) with the customer name, car information, and job information displayed. The (Quote) flag indicates open orders associated with the appointment.

If you select a box in the grid and click Daily View, the Appointment List for that day displays.

Note: The Total Scheduled Hours field allows you to see the total appointment hours scheduled for the day.

4. Use the following buttons to perform the corresponding function:

- **Daily View** - To access the Appointments List window from the Calendar view.
- **Print** - To print the report for the current view (date range) of the Appointments Calendar.
- **Close** - To close the window.

Note: You cannot edit appointments from the Appointment Calendar. Use the **Daily View** button to open the Appointment List window, where you can use the **Edit** button to edit the appointment.

Viewing Appointments

1. From the **Scheduling** shortcut bar, select **Appointments List**.

Result: The **Appointments List** window is displayed and lists all appointments created in Manage or imported from the web.

Note: New appointments are displayed in blue.

The screenshot shows the 'Appointments List' window. At the top, there is a 'Search By' dropdown menu set to 'Customer Name' and an empty search input field. To the right, there are three radio buttons for filtering: 'View All Appointments' (selected), 'View Appointments By Day', and 'View Appointments Saved/Converted to a Quote'. Below this is a table with columns: Date, Time, Job, Customer /, and Vehicle. The table contains 15 rows of appointment data. At the bottom of the window, there is a status bar showing 'Status: Done', 'Unread Record Count: 0', and 'Record Count: 15'. Below the status bar are several buttons: 'Import', 'Convert', 'New', 'Edit', 'Delete', 'Print', 'Refresh', and a 'Close' button.

Date	Time	Job	Customer /	Vehicle
12/19/2007	Morning	CV Joint, Replace FwD	BANANA, BONNIE	2002 CADILLAC SEVILLE SLS
2/1/2008	Morning	Cooling System - Coolant Leak	BLACKBERRY, BOYD	2005 JAGUAR SUPER V8
1/30/2008	Morning	Job #1	Figg, Mia	2004 HONDA CIVIC EX
2/1/2008	Afternoon	CV Joint, Replace FwD	Figg, Mia	2004 HONDA CIVIC EX
2/1/2008	Morning	Inspect Front-Wheel Drive Axles	Figg, Mia	2004 HONDA CIVIC EX
2/1/2008	Morning	Brake Pads - Front	FUDGE, FREIDA	2006 TOYOTA HIGHLANDER HYBRID
3/1/2008	Morning	Alignment, 2'wheels	HONEYDEW, HANNA	2000 VOLKSWAGEN BEETLE
2/1/2008	Afternoon	Job #1	IGLOO, IVANNA	1997 PLYMOUTH VOYAGER
2/29/2008	Morning	Hub Repack	KNISH, KAROL	2001 SUBARU LEGACY
2/1/2008	Morning	TuneUp, 4 Cylinder - Minor	LEMON, LANA	1996 HYUNDAI ELANTRA GLS
5/2/2007	Afternoon	Smog Check, Test Only	VALIUM, VICTOR	1988 YUGO GV
5/1/2007	Evening	Express Lube and Oil Change	VANILLA, VALERIE	2000 MERCEDES-BENZ SL600
4/3/2007	Morning	Alignment, Two Wheel	XANADU, XAVIAR	2003 JAGUAR VANDEN PLAS
4/2/2007	Morning	Brake Job, Front	YUCCA, YANNI	2004 TOYOTA SEQUOIA
4/1/2007	Morning	Car Detailing	ZUCCHINI, ZELDA	1997 CHEVROLET CAMARO RS

2. Use the Search By list, Appointment Date field, and the filter radio buttons (View All Appointments, View Appointments By Day, and View Appointments Saved/Converted to a Quote) to search for specific appointments in the Appointments List.
3. Use the following buttons to perform the corresponding function:
 - **Import** - The list of scheduled appointments is refreshed with the latest information from the MARKET web site.
 - **Convert** - The appointment information is used to create a new order. See "Converting Appointments" on page 129.
 - **New** - A New Appointment window opens allowing you to add an appointment directly into Manage. See "Completing the New Appointment window" on page 128.
You can also use the **Save as Appointment** button on the order window to open the **New Appointment** window, with the information entered for the order.
 - **Edit** - An Edit Appointment window opens allowing you to modify appointment information.

- **Delete** - The selected appointment is deleted from the appointments database. The appointment information remains stored in the Service History database.
- **Print** - To print the Appointments report.
- **Refresh** - To refresh the displayed list.
- **Close** - The window is closed.

Completing the New Appointment window

1. From the **Scheduling** shortcut bar, select **Appointments List**.
2. Select **New**.

Result: The **New Appointment** window displays.

3. Use the **Customer** button to select or enter a customer.
4. Enter or select a **Vehicle** as prompted.
5. Select an appointment date and time.
6. Select either Pre-Defined Services or Free Form Services.
If Pre-Defined Services is selected, define the services using the following fields:

- Category - Use this field to select the service category.
- Available Services - Use this field to select services and use the Add arrow to move the service to the Selected Services field.
- Selected Services - This field lists the services that are included in the appointment. Use the Remove arrow to move a service back to the Available Services list.

If Free Form Services is selected, define the services using the following fields:

- Other Services - Use this field to type in service descriptions and use the Add arrow to move the service to the Selected Services field.
- Selected Services - This field lists the services that are included in the appointment. Use the Remove arrow to remove a service from the list.

7. Click the **Submit** button to save the appointment.

Importing Appointments

1. From the **Scheduling** shortcut bar, select **Appointments List**.

Result: The list of scheduled appointments is displayed.

2. Click **Import**.

Result: The scheduled appointment data in Manage is synchronized with the appointment data on the MARKET server.

Converting Appointments

1. From the **Scheduling** shortcut bar, select **Appointments List**.

Result: The list of scheduled appointments is displayed.

2. Select an appointment and click **Convert**.

Result: A **Select Customer** window opens.

3. If the customer is not listed, add it by clicking **New** and completing the New Customer window (see "Adding Customers" on page 44) or if the customer is listed, select the customer and click **Select**.

Result: The **Select Vehicle** dialog box is displayed.

4. If the vehicle is not listed, add it by clicking **New** and completing the New Vehicle window (see "Adding Vehicles" on page 51) or if the vehicle is listed, select the vehicle and click **Select**.

Result: A new quote form displays with the selected customer and vehicle information and the job information from the appointment record.

5. Edit each Job to ensure that all the information is complete (see "Editing Jobs and Items" on page 78).

6. Save the Quote (see "Chapter 6: Saving and Converting Repair Orders" on page 74).

7. Click **Close**.

Result: You are returned to the Appointments List.

Note: The Appointment Calendar feature is only functional when the subscription includes Elite Features.

Security Profiles

Manage allows you the option of configuring password protection of system features. A shop administrator or manager can configure security profiles with different levels of access to the protected features.

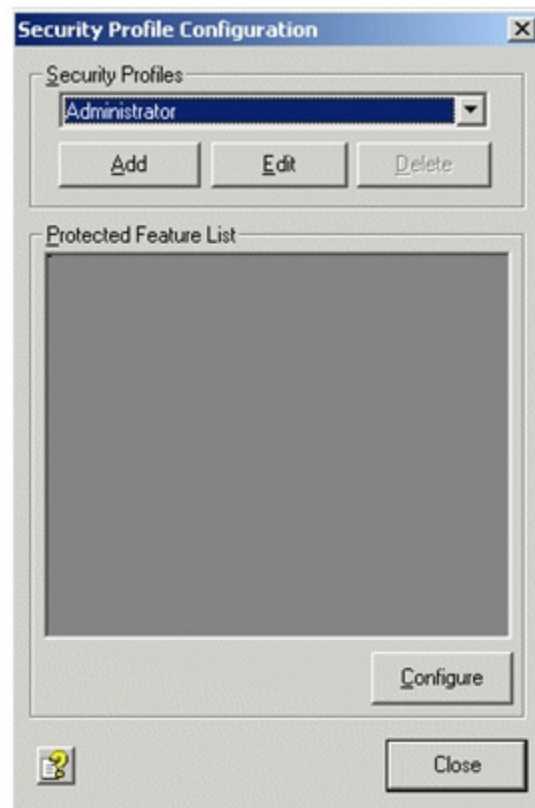
When security profiles are configured users are only prompted to enter a password when they activate a protected feature, such as deleting parts.

To Configure Security Profiles:

Activate Security Profiles by setting the Administrator password.

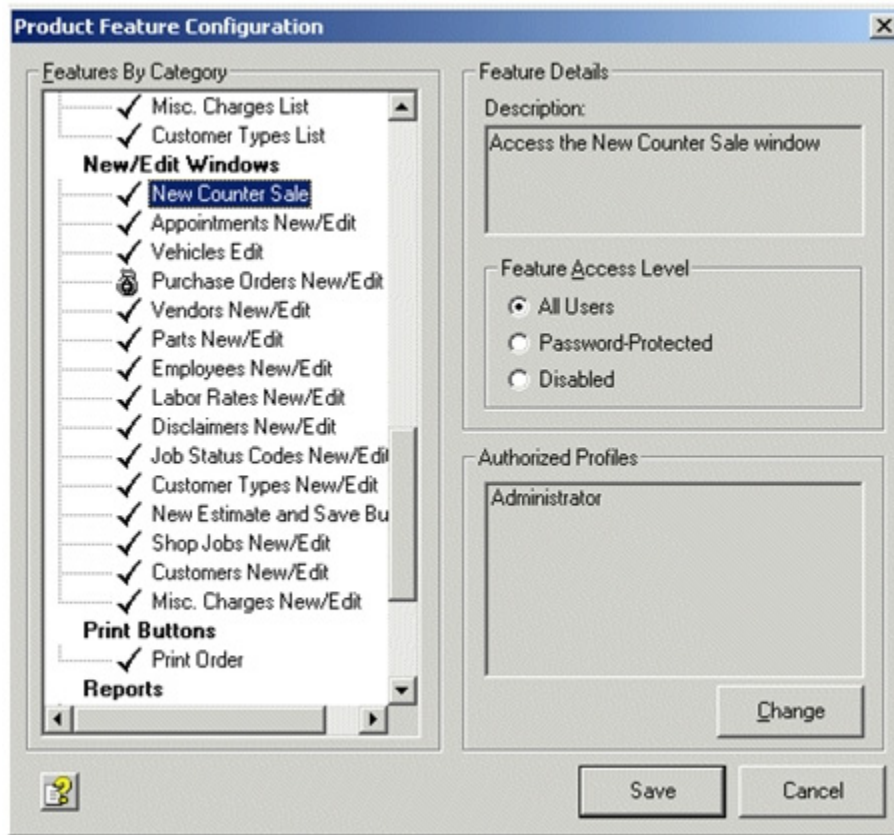
1. From the Setup menu, select **Security Settings**.



Result: The Security Profile Configuration dialog box displays. Since passwords have not already been configured, if you attempt to add profiles or configure Product Features you will get a warning and the Edit Security Profile dialog box displays.



2. Click **Edit**.
Result: The Edit Security Profile dialog box displays.
3. Enter a password and click **Save**.

- Click **Configure** to update the Product Feature Configuration.
Result: The **Product Feature Configuration** dialog box is displayed.



- A mark indicates that the product feature can be accessed without password restriction.
 - A  mark indicates that the product feature can only be accessed by the proper password profiles.
 - A  mark indicates that the product feature is disabled for all users.
- Select a product feature in the **Features By Category** box to view or change the Access Level.
 - Select a **Feature Access Level** to associate with the selected profile.
 - Click **Save** to save the feature configuration.
Result: The **Security Profile Configuration** dialog box is displayed.
 - Click **Close** to save the Administrator profile.

To Add additional Security Profiles:

1. From the Security Profile Configuration dialog box, click **Add**.

Result: The **New Security Profile** dialog box displays.



2. Enter a name (user name, employee name, or nickname) in the **Profile Name** field.
3. Enter a unique password in the **Password** field.
4. Re-enter the same password in the **Re-Enter Password** field.
5. If appropriate, select **Disabled** to have the password turned off until needed.
6. Click **Save** to save the new profile.

Result: The **Security Profile Configuration** dialog box is displayed.

Chapter 12: Reports

Use reports to help manage your shop, analyze the profitability of your work and track the efficiency of your technicians. Listed below are:

- basic report procedures
- list of reports by menu groupings with a brief description
- alphabetical list of reports with a brief description
- examples of the report menus

Basic Report Procedure

To view and print reports:

1. From the **Reports** menu, select one of the following:

- Company Setup Report
- Customer Reports
- Management Reports
- Shop Reports
- Inventory Reports


Result: A dialog box displays all available reports, except when Company Setup report is selected.

2. Select the report.


3. Enter a date range or customer name if it applies to the selected report.

4. Click the **OK** button.

Result: The report is displayed in a separate window.

5. Click the print button  at the top of the window to print the report.

Result: A **Print** dialog box allows you to select the print range and the number of copies.

6. Click the export button  at the top of the window to export the report data to a file.

Result: An **Export** dialog box allows you to select the format and destination of the exported file.

7. Click the **OK** button to print.

Note: Reports normally print on the default printer. To select a different printer open the report and select **Printer Setup** from the **File** menu in the report window.

Reports by Menu

Reports by Menu

Report Name	Report Description	Significant Field	Elite Only
Report Group (Menu): None			
Company Setup	Lists your Company Setup details	<ul style="list-style-type: none"> • Tax rates and markups • shop supplies charges • hazmat charges • profit margin % • price matrix settings 	N
Report Group (Menu): Customer Reports			
Customer List By Last Name	Lists all the customers in your system, with a brief summary of their sales and service history.	<ul style="list-style-type: none"> • year-to-date (YTD) sales • total sales 	N
Company Phone List	Lists all business customers.	<ul style="list-style-type: none"> • phone numbers 	N
Customer Service History	Lists a brief summary of all posted and closed invoices for a specific customer. You enter the customer's name when requesting the report.	<ul style="list-style-type: none"> • service dates • invoice numbers • vehicle information • service descriptions • year-to-date sales 	N
Vehicle Service History	Lists a brief summary of YMME information and service dates for each vehicle assigned to the customer selected.	<ul style="list-style-type: none"> • customer's vehicle service history 	N
All Customers and Vehicles	Lists all customers and the vehicles assigned to the customers.	<ul style="list-style-type: none"> • year to date sales • total sales 	N
Balance Due/Accounts Receivable	Lists all customers with a balance due.	<ul style="list-style-type: none"> • year-to-date sales • total sales • amount paid • balance due 	N
Customer Balance Due Statement	This is a balance due statement for a customer.	<ul style="list-style-type: none"> • invoice date and number • vehicle information • invoice total • amount paid • balance due for each invoice • total due 	N
Balance Due Statement for All	This is series of balance due statements that can be given to customers. Selecting this report creates a separate statement for	<ul style="list-style-type: none"> • invoice date and number • vehicle information 	N

Report Name	Report Description	Significant Field	Elite Only
	each customer with a balance due.	<ul style="list-style-type: none"> • invoice total • amount paid • balance due for each invoice • total due 	
Negative Customer Balances	Lists all customers with a negative balance due.	<ul style="list-style-type: none"> • year-to-date sales • total sales • amount paid • the negative balance due by customer 	N
Customer Credit Balances	Lists all customers with a credit balance.	<ul style="list-style-type: none"> • credit amount for each customer with a credit balance 	N
Current Payments and Deposits	Lists all current payments on Repair Orders and cashiered invoices.	<ul style="list-style-type: none"> • payment amount • payment type • total payments 	N
Missed Appointments	Lists all appointments missed within a date range.	<ul style="list-style-type: none"> • appointment date • customer name • contact information • job description 	N
Scheduled Appointments	Lists all appointments scheduled within a date range.	<ul style="list-style-type: none"> • customer name • phone number • email • appointment date 	N
Mailing Labels	Lists all customers in a format compatible with printed mailing labels.	<ul style="list-style-type: none"> • formatted list compatible with the Avery 5160 standard mailing labels 	N
Hazmat	Lists all your billed hazardous materials charges for a date range you specify.	<ul style="list-style-type: none"> • invoice date and number • parts total • labor total • hazmat charge 	N
Sales	Lists all your closed and posted invoices for a date range you specify.	<ul style="list-style-type: none"> • charge amount (by labor, parts, miscellaneous, sublet, hazmat and shop supplies) • discounts, parts tax, labor tax and totals 	N

Report Name	Report Description	Significant Field	Elite Only
Sales Tax	Lists both taxed and tax exempt invoices for a date range you specify.	<ul style="list-style-type: none"> • invoice date, number and total • taxable parts, non-taxable parts, parts total • taxable labor, non-taxable labor, labor total • parts tax, labor tax and the tax total 	N
Shop Supplies	Lists all billed shop supply charges for a date range you specify.	<ul style="list-style-type: none"> • all billed shop supply charges 	N
Cash Receipts	Lists all the payments and deposits for a date range you specify.	<ul style="list-style-type: none"> • payment type (cash, credit, check, debit, or other) • credit card name • payment amount • check # • authorization 	N
Cash Receipts by Day	Lists all the payments and deposits for a date range you specify.	<ul style="list-style-type: none"> • customer • invoice total • receipt amount • payment method • check # • authorization 	N
Voided	Lists all orders that have been voided, to provide a means of accounting for every order created.	<ul style="list-style-type: none"> • customer name • vehicle description • service advisor name 	N
Discounts	Lists the total discounts applied to posted invoices for a date range you specify.	<ul style="list-style-type: none"> • customer name • pre-discount invoice amount • parts, labor, and sublet discounts • invoice total 	N
Account Summary	Lists the total posted revenues by account number for a date range you specify.	<ul style="list-style-type: none"> • hours • rates • costs • accounts charged 	Y
Report Group (Menu): Management Reports > Sales Reports			
Sales Reports - Part Number	Lists all the part sales sorted by part numbers.	<ul style="list-style-type: none"> • part # and description 	N

Report Name	Report Description	Significant Field	Elite Only
		<ul style="list-style-type: none"> • average cost, sale and profit • qty 	
Sales Reports - Part Description	Lists all the part sales sorted by description.	<ul style="list-style-type: none"> • part # and description • average cost, sale, and profit • qty 	N
Sales Reports - Part Number by Part Source	Lists all the part sales sorted by part numbers and part source.	<ul style="list-style-type: none"> • part # and description • average cost, sale and profit • qty 	N
Sales Reports - Part Description by Part Source	Lists all the part sales sorted by description and part source.	<ul style="list-style-type: none"> • part # and description • average cost, sale, and profit • qty and totals 	N
Sales Reports - Parts Not Stocked	Lists all part sales for parts not normally stocked in your shop.	<ul style="list-style-type: none"> • order # • part # and description • cost, sale and profit • qty and totals 	N
Sales Reports - Parts Stocked	Lists all part sales for parts normally stocked in your shop.	<ul style="list-style-type: none"> • order # • part # and description • cost, sale and profit • qty and totals 	N
Report Group (Menu): Manage Reports > Profit/Efficiency Reports			
Profit by Order for Parts and Labor	Lists all profits on parts and labor sorted by order number.	<ul style="list-style-type: none"> • post date • order number • costs, sales and profits 	N
Job Profit by Order	Lists all profits sorted by order number.	<ul style="list-style-type: none"> • post date • order # • job description • costs, sales, and profit 	N
Sales Profit by Technician	Lists all sales profits sorted by technician.	<ul style="list-style-type: none"> • post date • order number • job description • costs and sales 	N
Job Profit by Job Type	Lists all profits sorted by job type.	<ul style="list-style-type: none"> • post date 	N

Report Name	Report Description	Significant Field	Elite Only
		<ul style="list-style-type: none"> • order # • job description • costs, sales, and profits 	
Job Profit by Category Summary	Lists a summary of job profits sorted by job type.	<ul style="list-style-type: none"> • job category • costs and sales • profit % 	N
Technician Efficiency	Lists all the invoices the technician worked on for a date range you specify. The report uses the charged labor hours and the actual labor hours to calculate an efficiency percentage.	<ul style="list-style-type: none"> • technician name • posted invoice dates and numbers • labor descriptions • charged and actual hours • efficiency % 	N
Technician Efficiency by Job	Lists all the invoices the technician worked on for a date range you specify. The report uses the charged labor hours and the actual labor hours to calculate an efficiency percentage.	<ul style="list-style-type: none"> • post date • order number and job description • charged and actual hours • efficiency rating 	N
Report Group (Menu): Shop Reports			
Labor Rates	List of all the labor rates setup in your system.	<ul style="list-style-type: none"> • labor rate code • labor description • labor rate 	N
Generic Shop Jobs Note: This is a good report to print and post where your technicians and service writers can easily reference it, such as under glass on a countertop, in a binder, or on the wall.	List of all the Generic Shop Jobs set up in your system.	<ul style="list-style-type: none"> • Shop Jobs name and description • totals 	N
Specific Shop Jobs	List of all the Specific Shop Jobs set up in your system.	<ul style="list-style-type: none"> • Shop Job's vehicle name • description • total 	N
Miscellaneous Charges	List of all the miscellaneous charges set up in your system.	<ul style="list-style-type: none"> • miscellaneous charge code • description • retail charge • tax information 	N

Report Name	Report Description	Significant Field	Elite Only
Parts	List of all the parts set up in your system.	<ul style="list-style-type: none"> part number and description cost retail charge 	N
Recommendations	List of all outstanding recommendations whose service date falls within a specified date range.	<ul style="list-style-type: none"> customer information vehicle information recommended service date recommended service mileage 	N
Report Group (Menu): Inventory Reports			
Normally Stocked Parts by Number	Lists all the normally stocked parts in the shop inventory normally kept on hand, sorted by part number.	<ul style="list-style-type: none"> part number and description stocking levels quantity on hand cost selling price 	N
Normally Stocked Parts by Description	Lists all the normally stocked parts from the shop inventory normally kept on hand, sorted by part description.	<ul style="list-style-type: none"> part number and description stocking levels quantity on hand cost selling price 	N
Normally Stocked Parts by Primary Vendor	Lists all the normally stocked parts on order, sorted by primary vendor.	<ul style="list-style-type: none"> part number and description inventory quantity information cost, and selling price 	N
Normally Stocked Parts on Orders by Vendor	Lists all the normally stocked parts on order from the shop inventory with totals, sorted by vendor.	<ul style="list-style-type: none"> part number and description quantity on order cost and selling price 	Y
Normally Stocked Parts by Bin Location	Lists all the normally stocked parts on order, sorted by bin location.	<ul style="list-style-type: none"> part number and description stocking levels quantity on hand bin locations 	Y
Not Normally Stocked Parts by Part Number	Lists all the parts in the shop inventory not normally kept on	<ul style="list-style-type: none"> part number and description 	N

Report Name	Report Description	Significant Field	Elite Only
	hand, sorted by part number.	<ul style="list-style-type: none"> • cost • selling price 	
Not Normally Stocked Parts by Description	Lists all the parts from the shop inventory not normally kept on hand, sorted by part description.	<ul style="list-style-type: none"> • part number and description • cost • selling price 	N

Reports Alphabetically

Reports Listed Alphabetically

Report Name	Report Group (Menu)	Report Description	Significant Field	Elite Only
Account Summary	Revenue Reports	Lists the total posted revenues by account number for a date range you specify.	<ul style="list-style-type: none"> • hours • rates • costs • accounts charged 	Y
All Customers and Vehicles	Customer Reports	Lists all customers and the vehicles assigned to the customers.	<ul style="list-style-type: none"> • year to date sales • total sales 	N
Balance Due Statement for All	Customer Reports	This is series of balance due statements that can be given to customers. Selecting this report creates a separate statement for each customer with a balance due.	<ul style="list-style-type: none"> • invoice date and number • vehicle information • invoice total • amount paid • balance due for each invoice • total due 	N
Balance Due/Accounts Receivable	Customer Reports	Lists all customers with a balance due.	<ul style="list-style-type: none"> • year-to-date sales • total sales • amount paid • balance due 	Y
Cash Receipts	Customer Reports	Lists all the payments and deposits for a date range you specify.	<ul style="list-style-type: none"> • payment type (cash, credit, check, debit, or other) • credit card name • payment amount • check # • authorization 	N
Cash Receipts by Day	Customer Reports	Lists all the payments and deposits for a date range you specify.	<ul style="list-style-type: none"> • customer • invoice total • receipt amount 	N

Report Name	Report Group (Menu)	Report Description	Significant Field	Elite Only
			<ul style="list-style-type: none"> • payment method • check # • authorization 	
Company Phone List	Customer Reports	Lists all business customers.	<ul style="list-style-type: none"> • phone numbers 	N
Company Setup	None	Lists your Company Setup details	<ul style="list-style-type: none"> • Tax rates and markups • shop supplies charges • hazmat charges • profit margin % • price matrix settings 	N
Current Payments and Deposits	Customer Reports	Lists all current payments on Repair Orders and cashiered invoices.	<ul style="list-style-type: none"> • payment amount • payment type • total payments 	N
Customer Balance Due Statement	Customer Reports	This is a balance due statement for a customer.	<ul style="list-style-type: none"> • invoice date and number • vehicle information • invoice total • amount paid • balance due for each invoice • total due 	N
Customer Credit Balances	Customer Reports	Lists all customers with a credit balance.	<ul style="list-style-type: none"> • credit amount for each customer with a credit balance 	N
Customer List By Last Name	Customer Reports	Lists all the customers in your system, with a brief summary of their sales and service history.	<ul style="list-style-type: none"> • year-to-date (YTD) sales • total sales 	N
Customer Service History	Customer Reports	Lists a brief summary of all posted and closed invoices for a specific customer. You enter the customer's name when requesting the report.	<ul style="list-style-type: none"> • service dates • invoice numbers 	N

Report Name	Report Group (Menu)	Report Description	Significant Field	Elite Only
			<ul style="list-style-type: none"> • vehicle information • service descriptions • year-to-date sales 	
Discounts	Revenue Reports	Lists the total discounts applied to posted invoices for a date range you specify.	<ul style="list-style-type: none"> • customer name • pre-discount invoice amount • parts, labor, and sublet discounts • invoice total 	N
Generic Shop Jobs Note: This is a good report to print and post where your technicians and service writers can easily reference it, such as under glass on a countertop, in a binder, or on the wall.	Shop Reports	List of all the Generic Shop Jobs set up in your system.	<ul style="list-style-type: none"> • Shop Jobs name and description • totals 	N
Hazmat	Revenue Reports	Lists all your billed hazardous materials charges for a date range you specify.	<ul style="list-style-type: none"> • invoice date and number • parts total • labor total • hazmat charge 	N
Job Profit by Category Summary	Manage Reports > Profit/Efficiency Reports	Lists a summary of job profits sorted by job type.	<ul style="list-style-type: none"> • job category • costs and sales • profit % 	N
Job Profit by Job Type	Manage Reports > Profit/Efficiency Reports	Lists all profits sorted by job type.	<ul style="list-style-type: none"> • post date • order # • job description • costs, sales, and profits 	N
Job Profit by Order	Manage Reports >	Lists all profits sorted by order number.	<ul style="list-style-type: none"> • post date 	N

Report Name	Report Group (Menu)	Report Description	Significant Field	Elite Only
	Profit/Efficiency Reports		<ul style="list-style-type: none"> • order # • job description • costs, sales, and profit 	
Labor Rates	Shop Reports	List of all the labor rates setup in your system.	<ul style="list-style-type: none"> • labor rate code • labor description • labor rate 	N
Mailing Labels	Customer Reports	Lists all customers in a format compatible with printed mailing labels.	<ul style="list-style-type: none"> • formatted list compatible with the Avery 5160 standard mailing labels 	N
Miscellaneous Charges	Shop Reports	List of all the miscellaneous charges set up in your system.	<ul style="list-style-type: none"> • miscellaneous charge code • description • retail charge • tax information 	N
Missed Appointments	Customer Reports	Lists all appointments missed within a date range.	<ul style="list-style-type: none"> • appointment date • customer name • contact information • job description 	N
Negative Customer Balances	Customer Reports	Lists all customers with a negative balance due.	<ul style="list-style-type: none"> • year-to-date sales • total sales • amount paid • the negative balance due by customer 	N
Normally Stocked Parts by Bin Location	Inventory Reports	Lists all the normally stocked parts on order, sorted by bin location.	<ul style="list-style-type: none"> • part number and description • stocking levels 	Y

Report Name	Report Group (Menu)	Report Description	Significant Field	Elite Only
			<ul style="list-style-type: none"> • quantity on hand • bin locations 	
Normally Stocked Parts by Description	Inventory Reports	Lists all the normally stocked parts from the shop inventory normally kept on hand, sorted by part description.	<ul style="list-style-type: none"> • part number and description • stocking levels • quantity on hand • cost • selling price 	N
Normally Stocked Parts by Number	Inventory Reports	Lists all the normally stocked parts in the shop inventory normally kept on hand, sorted by part number.	<ul style="list-style-type: none"> • part number and description • stocking levels • quantity on hand • cost • selling price 	N
Normally Stocked Parts by Primary Vendor	Inventory Reports	Lists all the normally stocked parts on order, sorted by primary vendor.	<ul style="list-style-type: none"> • part number and description • inventory quantity information • cost, and selling price 	Y
Normally Stocked Parts on Orders by Vendor	Inventory Reports	Lists all the normally stocked parts on order from the shop inventory with totals, sorted by vendor.	<ul style="list-style-type: none"> • part number and description • quantity on order • cost and selling price 	Y
Not Normally Stocked Parts by Description	Inventory Reports	Lists all the parts from the shop inventory not normally kept on hand, sorted by part description.	<ul style="list-style-type: none"> • part number and description • cost • selling price 	N
Not Normally Stocked	Inventory	Lists all the parts in the shop	<ul style="list-style-type: none"> • part number 	Y

Report Name	Report Group (Menu)	Report Description	Significant Field	Elite Only
Parts by Part Number	Reports	inventory not normally kept on hand, sorted by part number.	and description <ul style="list-style-type: none"> • cost • selling price 	
Parts	Shop Reports	List of all the parts set up in your system.	<ul style="list-style-type: none"> • part number and description • cost • retail charge 	N
Profit by Order for Parts and Labor	Manage Reports > Profit/Efficiency Reports	Lists all profits on parts and labor sorted by order number.	<ul style="list-style-type: none"> • post date • order number • costs, sales and profits 	N
Recommendations	Shop Reports	List of all outstanding recommendations whose service date falls within a specified date range.	<ul style="list-style-type: none"> • customer information • vehicle information • recommended service date • recommended service mileage 	N
Sales	Customer Reports	Lists all your closed and posted invoices for a date range you specify.	<ul style="list-style-type: none"> • charge amount (by labor, parts, miscellaneous, sublet, hazmat and shop supplies) • discounts, parts tax, labor tax and totals 	N
Sales Profit by Technician	Manage Reports > Profit/Efficiency Reports	Lists all sales profits sorted by technician.	<ul style="list-style-type: none"> • post date • order number • job description • costs and sales 	N
Sales Reports - Part Sales by Description	Management Reports > Sales Reports	Lists all the part sales sorted by description.	<ul style="list-style-type: none"> • part # and description • average cost, 	N

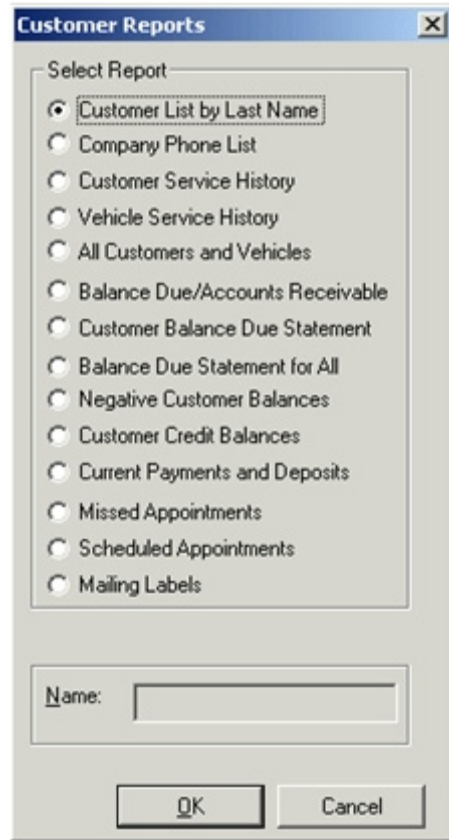
Report Name	Report Group (Menu)	Report Description	Significant Field	Elite Only
			sale, and profit • qty	
Sales Reports - Part sales by Description by Part Source	Management Reports > Sales Reports	Lists all the part sales sorted by description and part source.	• part # and description • average cost, sale, and profit • qty and totals	N
Sales Reports - Part sales by Part Number	Management Reports > Sales Reports	Lists all the part sales sorted by part numbers.	• part # and description • average cost, sale and profit • qty	N
Sales Reports - Part sales by Part Number by Source	Management Reports > Sales Reports	Lists all the part sales sorted by part numbers and part source.	• part # and description • average cost, sale and profit • qty	N
Sales Reports - Parts Not Stocked	Management Reports > Sales Reports	Lists all part sales for parts not normally stocked in your shop.	• order # • part # and description • cost, sale and profit • qty and totals	N
Sales Reports - Parts Stocked	Management Reports > Sales Reports	Lists all part sales for parts normally stocked in your shop.	• order # • part # and description • cost, sale and profit • qty and totals	N
Sales Tax	Revenue Reports	Lists both taxed and tax exempt invoices for a date range you specify.	• invoice date, number and total • taxable parts, non-taxable parts, parts total • taxable labor, non-taxable labor, labor total	N

Report Name	Report Group (Menu)	Report Description	Significant Field	Elite Only
			<ul style="list-style-type: none"> parts tax, labor tax and the tax total 	
Scheduled Appointments	Customer Reports	Lists all appointments scheduled within a date range.	<ul style="list-style-type: none"> customer name phone number email appointment date 	N
Shop Supplies	Revenue Reports	Lists all billed shop supply charges for a date range you specify.	<ul style="list-style-type: none"> all billed shop supply charges 	N
Specific Shop Jobs	Shop Reports	List of all the Specific Shop Jobs set up in your system.	<ul style="list-style-type: none"> Shop Job's vehicle name description total 	N
Technician Efficiency	Manage Reports > Profit/Efficiency Reports	Lists all the invoices the technician worked on for a date range you specify. The report uses the charged labor hours and the actual labor hours to calculate an efficiency percentage.	<ul style="list-style-type: none"> technician name posted invoice dates and numbers labor descriptions charged and actual hours efficiency % 	N
Technician Efficiency by Job	Manage Reports > Profit/Efficiency Reports	Lists all the invoices the technician worked on for a date range you specify. The report uses the charged labor hours and the actual labor hours to calculate an efficiency percentage.	<ul style="list-style-type: none"> post date order number and job description charged and actual hours efficiency rating 	N
Vehicle Service History	Customer Reports	Lists a brief summary of YMME information and service dates for each vehicle assigned to the customer selected.	<ul style="list-style-type: none"> customer's vehicle service history 	N
Voided	Revenue Reports	Lists all orders that have been voided, to provide a means of accounting for every order created.	<ul style="list-style-type: none"> customer name vehicle 	N

Report Name	Report Group (Menu)	Report Description	Significant Field	Elite Only
			description • service advisor name	

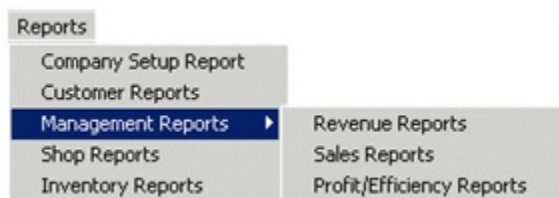
Report Menus

Customer Reports



Management Reports

The following types of management reports are available:



Revenue Reports

Revenue Reports

Select Report

- Hazmat
- Sales Tax
- Sales
- Shop Supplies
- Cash Receipts
- Cash Receipts by Day
- Voided
- Discounts
- Account Summary

Date

From: 01/24/2008

To: 01/24/2008

RD Number

From:

To:

OK Cancel

Sales Reports

Sales Reports

Select Report

- Part Sales by Part Number
- Part Sales by Part Description
- Part Sales by Part Number by Source
- Part Sales by Part Description by Source
- Parts Not Stocked
- Parts Stocked

Date

From: 01/12/2007

To: 06/ 2 /2008

OK Cancel

Profit/Efficiency Reports

Profit/Efficiency Reports

Select Report

- Profit by Order for Parts and Labor
- Job Profit by Order
- Sales Profit by Technician
- Job Profit by Job Type
- Job Profit by Category Summary
- Technician Efficiency
- Technician Efficiency by Job

Date

From: 06/ 2 /2008

To: 06/ 2 /2008

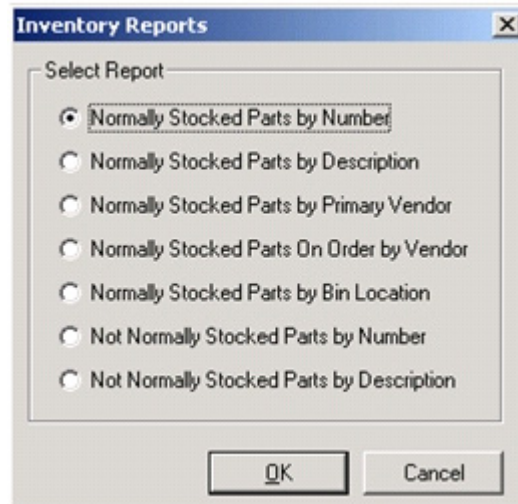
OK Cancel

Shop Reports



Inventory Reports

The following types of Inventory reports are available:



Chapter 13: Repair Information

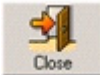
The Repair Information library is a searchable library of automotive repair information, Technical Service Bulletins, Diagnostic Trouble Codes, and diagrams.

When creating an estimate or modifying a repair order you can access the ALLDATA library of Repair Information (if the vehicle information is available) by clicking **Repair Information** on the order window.

The following list is displayed:

- Service Precautions
- Application and ID
- Testing and Inspection
- Locations
- Diagrams
- Specifications
- Technical Service Bulletins
- Tools and Equipment
- Fundamentals and Basics
- Diagnostic Trouble Codes

Accessing Repair Information

1. From the shortcut bar click the **Repair Information** icon.
Result: The **Select Vehicle YMME Description** window displays.
2. Select the appropriate YMME information for the vehicle that you are researching. The YMME represents:
 - Year - 1966 to the current year
 - make
 - model
 - engine information
3. Select the type of information desired.
4. When you are finished accessing the data, click the **Close** button  to return to the ManageSM windows.



Service Precaution

The Service Precautions category provides information regarding environmental and safety concerns. Review this category prior to starting any diagnostic or repair services. It details information about conditions, actions, or procedures that may cause harm to the customer, the vehicle technician, the environment, or the vehicle.



Application and ID

The articles in this category include information used to correctly identify the vehicle and its components. It is necessary to properly identify vehicles and components to ensure that only correct parts and procedures are used for repair and maintenance.

Topics and identification methods can include:

- Vehicle Identification Number
- Engine Number
- Transmission Number
- Paint Code
- Identification Number Locations



Testing and Inspection

The Testing and Inspection category includes articles to help diagnose problems and verify proper system and component operation.

Diagnosis information about components is contained under this heading. Diagnosis information about systems and subsystems is contained under the System Diagnosis heading.



Locations

The Locations category includes information and diagrams to assist in locating various components and systems.

Some of the possible subcategories are:

- Component Locations
- Connector Locations
- Ground Locations
- Splice Locations
- Harness Locations



Diagrams

The Diagrams category includes images and diagrams to illustrate system layout and connections. These images are supplied by the manufacturers and give detailed visual references for repairs. Diagrams can also be manipulated and magnified for better viewing of the essential area. See "Zoom" on page 156.

Some of the possible types are:

- Electrical Diagrams
- Mechanical Diagrams
- Connectors
- Vacuum and Vapor Hose Diagrams



Zoom

When viewing diagrams the Zoom mode allows you to enlarge diagrams.

From the Menu bar click the Zoom button and select the Zoom percentage from the drop down list.



Specifications

The Specifications category contains the manufacturers specifications. Some of the possible categories are:

- Electrical Specifications
- Mechanical Specifications
- Pressure, Vacuum, and Temperature Specifications
- Capacity Specifications



Technical Service Bulletins

Technical Service Bulletins (TSBs) are issued by vehicle manufacturers and contain up-to-date part numbers, manual revisions, recalls, and testing and repair procedures. ALLDATA Repair Information contains thousands of TSBs, and more than 6,000 new TSBs are issued by manufacturers yearly.

TSBs are issued after the vehicle has been released to the market and they contain critical information from a simple tire change to a complex diagnostic procedure. Many of the fixes found in TSBs are unavailable elsewhere.

Review TSBs before starting any diagnostic or repair service to avoid overlooking a documented answer to a perplexing problem. Use TSBs to save time while correctly diagnosing and repairing the vehicle.

View all TSBs for a vehicle, or only view those that pertain to a specific System or Component. TSBs are indexed at the vehicle level, the system level, the subsystem level, and by individual component.



Tools and Equipment

The Tools and Equipment category describes special tools that are used for testing, diagnosis and repair procedures. These articles include both text descriptions and diagrams of the tools.



Fundamentals and Basics

The Fundamentals and Basics category provides generalized information on vehicle systems and component operations. This section is not vehicle specific, but it provides a good basis for understanding how your vehicle operates.



Diagnostic Trouble Codes

The Diagnostic Trouble Code (DTC) category includes shortcuts to specific trouble code testing and inspection information.

Chapter 14: Data Transfers (Exporting Data)

Exporting XML Data

The XML Data Export allows you to extract a file from ManageSM which includes customer, vehicle and service information from posted invoices and counter sales. This file can be given to a customer relations management (CRM) company for simple processes such as creating mailing labels, or for complex customer follow-up and shop analysis.

You can set the XML Data Export file to automatically generate on a daily, weekly or monthly basis, or you can manually generate it.

To set automatic XML exports once a month or daily:

1. From the **Setup** menu or shortcut bar, select **Company Setup**.
2. On the **Setup** tab, click the **Export** button.
Result: The MANAGE **Data Export Settings** dialog box is displayed.



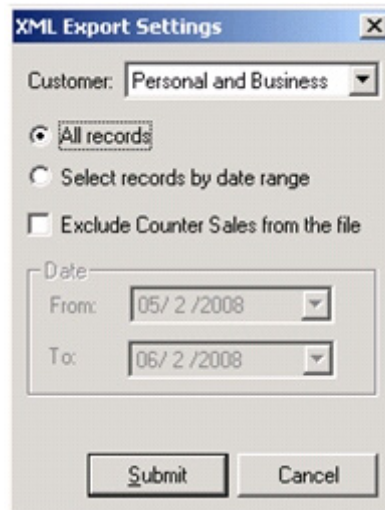
3. In the **Export** drop-list, select **Monthly** or **Daily**.
Note: Choosing the Never option disables automatic exports.
4. Enter the day of the month or week the export should take place.
5. Click the **Submit** button.
Result: Exports automatically take place on the days selected. The file is located in your ALLDATAW/ServiceCenter directory.

To manually generate the XML Data Export file:

1. From the **File** menu, select **Export....**

2. Select **XML Data Export**.

Result: The **XML Export Settings** dialog box is displayed.



3. From the **Customer** drop-list, select **Personal and Business**, **Business Only** or **Personal Only**.

- Personal and Business includes all customers in the file.
- Business Only includes only business customers in the file.
- Personal Only includes only personal, non-business customers in the file.

4. Select **All records** or **Select records by date range**.

5. Select the **Exclude Counter Sales from this file** check box if you do not want counter sale data included.

6. If you did not select all records, enter a date range.

7. Click the **Submit** button.

Result: A **Save As** dialog is displayed.

8. Type a file name and select where to save the file. The default is MANAGE.xml in your ALLDATAW\ServiceCenter directory.

9. Click the **Save** button.

Exporting Excel Data

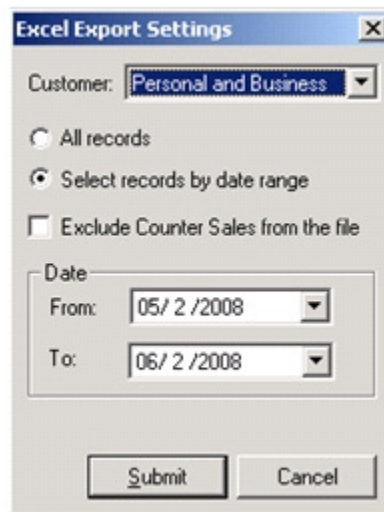
The Excel Data Export allows you to extract a file from ManageSM which includes customer, vehicle and service information from posted invoices and counter sales. This file has an .xls (Excel) extension, but is in an HTML format so can be opened in any HTML-compliant application (such as a browser or Word). Use this data for simple processes such as creating mailing labels, or for complex customer follow-up and shop analysis.

To generate the Excel Data Export file:

1. From the **File** menu, select **Export....**

2. Select **Excel Export**.

Result: The **Excel Export Settings** dialog box is displayed.



3. From the **Customer** drop-list, select **Personal and Business**, **Business Only** or **Personal Only**.

- Personal and Business includes all customers in the file.
- Business Only includes only business customers in the file.
- Personal Only includes only personal, non-business customers in the file.

4. Select **All records** or **Select records by date range**.

5. Click to check the **Exclude Counter Sales from this file** check box if you do not want counter sale data included.

6. If you did not select all records, enter a date range.

7. Click the **Submit** button.

Result: A **Save As** dialog is displayed.

8. Type a file name and select where to save the file.

- Click the **Save** button.

Exporting MARKET Data

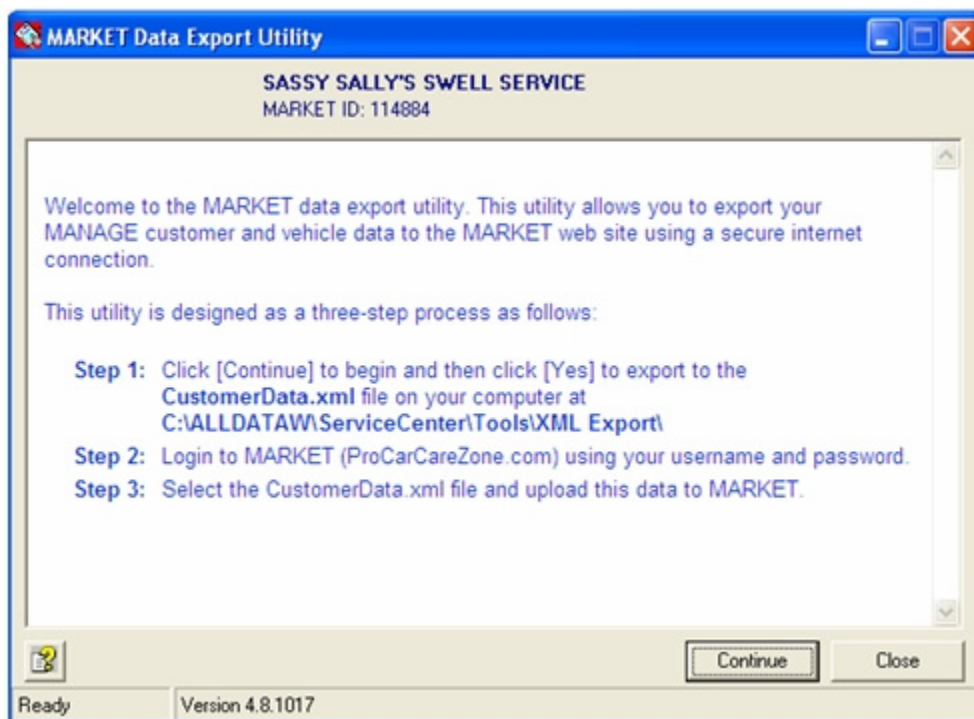
The MARKET Data Export option allows you to export your customer and vehicle information to the MARKET web site where it can be used to schedule service appointments.

To export the customer and vehicle information file:

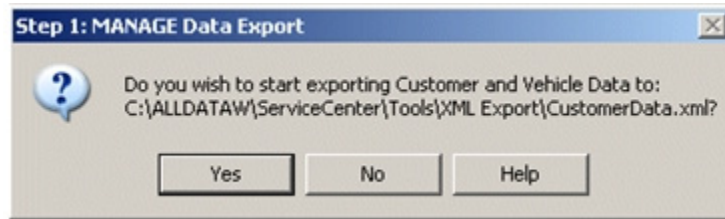
- From the **File** menu, select **Export....**
- Select **MARKET Data Export**.

Result: A welcome page displays.

Note: If you receive the message "MARKET ID: Not configured in MANAGE Company Setup", enter a Shop ID number in the **Company Setup** window. Refer to "Setting Setup Information" on page 20.



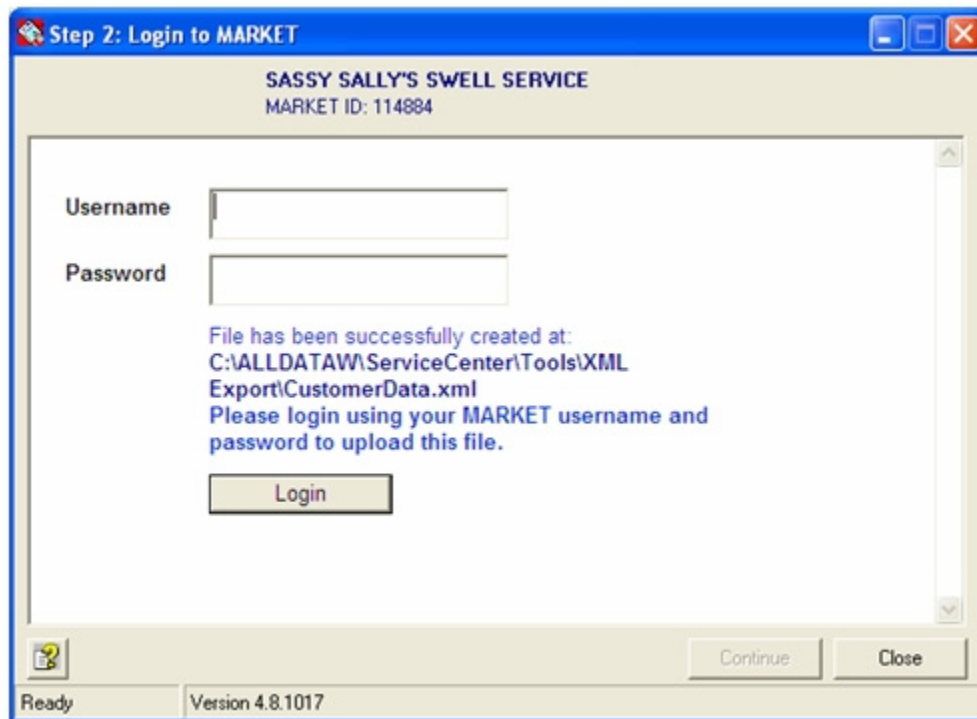
- Click **Continue**.
- Result:* The Step 1: Data Export box displays.



Note: The path displayed will vary depending on the Manage release.

4. Click **Yes** to start sending the customer and vehicle data to a file named Customer-Data.xml.

Result: The Step 2: Login to MARKET box displays.

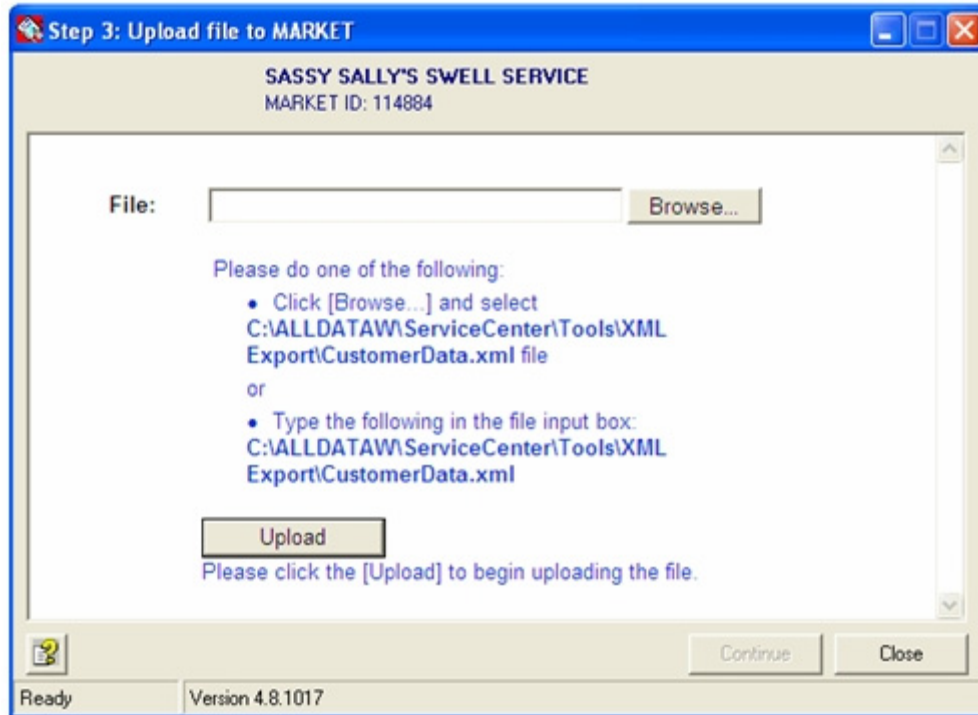


Note: In MANAGE 4.6 and later the data file is stored at c:\ALLDATAW\ServiceCenter\Tools\XML Export, while in previous releases the file is stored at c:\. The Customer-Data.xml file is created or automatically overwritten (if it exists) in the appropriate directory.

5. Login to the MARKET site by entering your user name and password and clicking **Continue**.

Note: If you do not know your user name and password contact Customer Support.

Result: The **Step 3: Upload file to MARKET** dialog box displays.

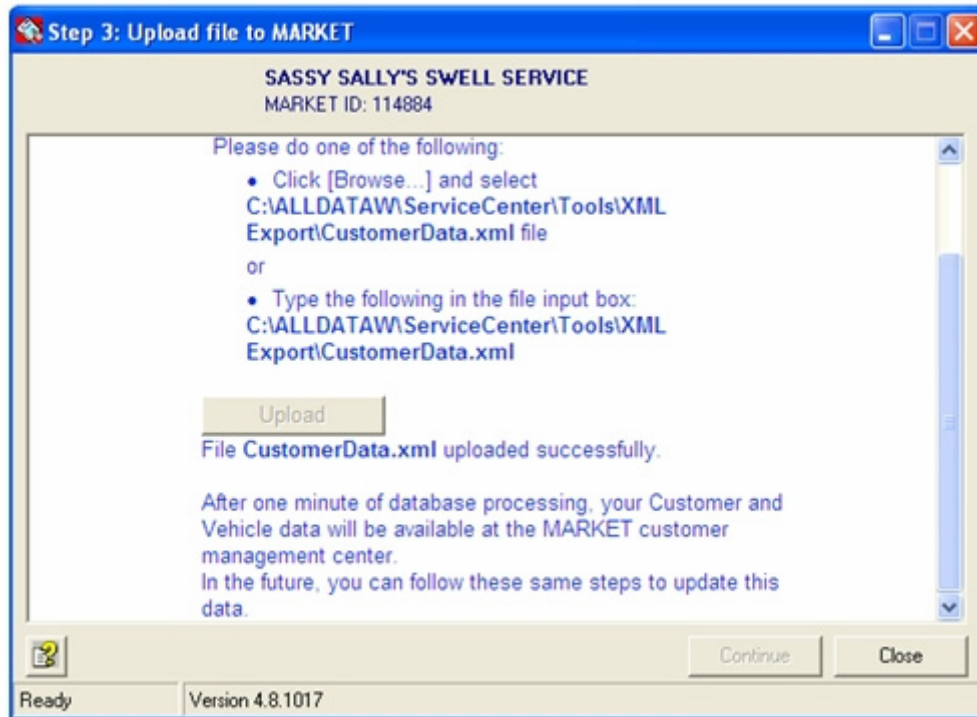


Note: The path displayed will vary depending on the Manage release.

6. Use the **Browse** button to navigate to the CustomerData.xml file.
Result: The **Choose File** dialog box displays.
7. Click on the CustomerData.xml file.
Result: The completed **Step 3** window displays.

8. Click **Upload**.

Result: The file is uploaded to the web site and **Step 3** dialog box is updated to show the status "File CustomerData.xml uploaded successfully".

9. Click **Close** to close the Data Export utility.

AutoAdmin Utility

The AutoAdmin utility program is installed on the server computer with ManageSM. This program is responsible for automatically running data backups, creating XML data, importing data, and exporting data as defined on the Setup tab of the Company setup window.

When the user logs into the server computer, AutoAdmin starts automatically if enabled on the Setup tab of the Company Setup window. It runs in the background and checks periodically to see if there are any scheduled tasks to run. The Manage icon is displayed in your system tray, which is in the right-hand corner of your taskbar (the bar at the bottom of your Windows desktop).

Right-clicking this icon displays the following AutoAdmin options in a pop-up menu:

- Start Service - starts AutoAdmin if it is currently paused (stopped).
- Stop Service - pauses the AutoAdmin program, but does not exit it.
- Exit - closes the AutoAdmin program. Restart AutoAdmin by rebooting the server computer, or by selecting AutoAdmin in the ALLDATA MANAGE folder (through the Start menu).
- About - displays a window with copyright information.

Note: Stopping or exiting AutoAdmin may interfere with scheduled tasks. Please consult your administrator before stopping or exiting AutoAdmin.

MANAGE AutoAdmin Status window

When Manage is started, a MANAGE **AutoAdmin Status** window displays. This window shows backup, import, and export tasks completed since Manage was last shut down, and the status of those tasks.

To disable the display of the MANAGE **AutoAdmin Status** window at startup, select the Do not show at startup check box.

- Click **OK** when you are finished.

For more information on setting the AutoAdmin options refer to “Setting Setup Information” on page 20.

Chapter 15: Database Backups

You can set your system to automatically back up your data on a daily, weekly or monthly basis. You should back up your data as often as possible and setting automatic backups is the easiest way to make sure you never forget.

You can also back up your data manually.

To set automatic backups to monthly or weekly:

1. From the **Setup** menu or shortcut bar, select **Company Setup**.
2. On the **Setup** tab, click the **Backup** button.
Result: The MANAGE **Backup Settings** dialog box is displayed.
3. In the **Backup** drop-list, select **Monthly** or **Daily**.
Note: Choosing the Never option disables automatic backups.
4. Enter the day of the month or the day of the week that the backup should take place.
Note: If you select Daily and only one day of the week, the backups occur weekly.

To manually back up your data:

The following process can only be done from the *server* computer.

1. From the **File** menu, select **Backup**.
2. If you want to save your backup file in a directory other than MANAGESM, browse to select that directory in the **Save As** dialog box.
Note: If you do not browse and select a directory, your backup file is saved to the MANAGE directory.
3. Select or enter the file name.
4. Click the **Save** button.

To restore your data:

If you find that customer, vehicle or service data was lost, please contact Customer Support. They will guide you through the restore process, using your back up files.