

Putting ShopKey Management to Work

Setting up LIVE Management System to Match Your
Business

Published by Mitchell 1
San Diego, CA

**Copyright 2004 Snap-on Technologies Inc. LLC. and MRIC, LLC
All Rights Reserved**

DISCLAIMER OF WARRANTIES: Although the information contained within this volume has been obtained from sources generally believed to be reliable, no warranty (expressed or implied) can be made as to its accuracy or completeness, nor is any responsibility assumed by Snap-on or anyone connected with it for loss or damages suffered through reliance on any information contained in this volume. SPECIFICALLY, NO WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR ANY OTHER WARRANTY IS MADE OR TO BE IMPLIED WITH RESPECT TO THIS VOLUME AND ITS CONTENTS. In no event will Mitchell Repair Information Company, LLC be liable for any damages direct or indirect, consequential or compensatory, including, without limitation, lost profits, for any representations, breaches or defaults arising out of the use of this volume. Customer agrees to indemnify Snap-on and hold it harmless against all claims and damages, including without limitation, reasonable attorney's fees arising out of the use of this volume, unless such claims or damages result from the infringement of any copyright or other proprietary right of any third party.

ShopKey is a registered trademark of Snap-on and MRIC used under license herein.

Mitchell and MRIC are registered trademarks of the Mitchell Repair Information Company.

Microsoft is a registered trademark of Microsoft Corporation.

Windows is a trademark of Microsoft Corporation.

Printed in the USA

Table of Contents

The Management Training & Setup Overview.....	1
Tips for a Better Software Launch Experience	1
Introduction	2
Section 1: Basic Rep-Assisted Setup Areas	3
BASICS: Shop Data 1 & 2	3
BASICS: Default Settings	4
BASICS: Shop/Hazmat.....	5
BASICS: Disclaimers.....	6
BASICS: Labor Rates.....	7
BASICS: Parts Discount Table	8
BASICS: Tax Rate.....	9
BASICS: Compound Taxes	9
BASICS: Income/Cash Accounts (Payment Types).....	10
BASICS: Standard Accounts	11
BASICS: Account Classes (Revenue).....	11
BASICS: Markup	12
Markup Percentage vs. Gross Profit	13
Parts Markup & Gross Profit Projections Table	14
BASICS: Price Markup Matrix.....	15
BASICS: Parts Pricing.....	16
BASICS: Technicians Setup	17
BASICS: Technicians Setup (Cont.)	18
BASICS: Reports/Printers.....	19
BASICS: Reports/Printers (Cont.).....	20
BASICS: End of Day Reports	21
BASICS: Notes.....	21
Section 2: Self Setup Options.....	22
Screen View.....	22
Estimate/RO Validations & Invoice Validations	22
Late Fees.....	23
Category	24
Part Code.....	24
Phone	25
Title.....	25
Location	26
Status	26
Follow-up (Postcards, Letters and Mail-Merge).....	27
Vendor Type	27

Symptoms	28
Program Security	29
Promotions: Packages & Discounts	29
Promotions: Tire Packages.....	30
Promotions: Brake Packages.....	31
Promotions: Lube, Oil & Filter Packages.....	32
Manufacturers (Line Codes)	33
Zip Code Mapping	33
Section 3: Get Ready, Get Set, Go LIVE.....	34
GET READY: Confirm Entry of Shop Information.....	34
Enter Customers & Vehicles	35
Enter Your Technicians	36
Enter Your Vendors.....	36
Enter Your Parts into Inventory List / Parts List.....	37
Build Your Own Parts Kits	38
Build Your Own Canned Jobs.....	38
Enter Your User Notes	38
Enter Your Additional Symptoms	39
Enter Your Promotions (Discounts & Packages)	39
Enter Your Location & Status Descriptions	39
Double Check Your Settings.....	40
Enter 2 Days of Invoices.....	41
GET SET: Final Countdown LIVE Checklist	42
GO: Set Starting Invoice	43

The Management Training & Setup Overview

1. Get an Overview with Jumpstart Guide (#1)
2. Learn program basics in DEMO (book #2)
 - a. Rep Assisted Program Basics
 - b. Self-Instruction of Additional Areas
 - c. Watch Training Videos / Use F1 Help
3. Prepare LIVE program with this book (#3)
 - a. Rep-assisted Setup of BASICS
 - b. Self-Setup of Additional Settings
 - c. **GET READY, GET SET, GO! LIVE**

You Are Now Here

Tips for a Better Software Launch Experience



- ? Copy the demo (training version) onto as many computers as you want! Shop personnel take to the program faster when they've had some relaxed time to get familiar with it. They can even use the CD to install demo at home.
- ? Don't rush it; the more you use the demo, the easier it gets. Depending on your schedule, it may take longer to achieve a comfort level, but your live experience will be better right away. Your time investment pays off later.
- ? Consider all program aspects carefully; a number of settings require a decision before going live. To change it later (after using live program for a while) may skew some reporting and results may be less than accurate.
- ? Take advantage of MANY keyboard shortcuts throughout program. If you learn these shortcuts, tasks are completed with reduced effort.

Putting Management System to Work is intended to compliment detailed program reference information in the User's Guide, located on the installation CD under 'View Documentation'.

TIP: Open the Users Guide file and select Save As and copy to your Desktop! This eliminates the need to have an installation CD loaded. The latest copy of the User's Guide may also be downloaded from

<http://www.shopkeysupport.com/docs>

Introduction

What Should I Do Next To Go LIVE With Management?

Now that you've learned the program's basic functions (book 2), you need to customize your software to match YOUR business. Before using it to create real estimates and orders, you must enter some basic information into it.

Save time and effort later by completing as much now, before "going live." This makes the software easier to use and it provides desired results faster.

This Go LIVE workbook consists of three main sections:

Section 1: BASIC rep-assisted setup areas

Basic setup includes: Default Settings, Labor Rate, Tax Rate, Income/Cash Accounts, Technicians, Reports & Printers, Markup and Markup Matrix, etc.

Section 2: Self setup that users complete for further customization

Self setup includes: Category, Part Codes, Location, Status, Followup, Packages, Symptoms, Screen View, Validations and Program Security.

Section 3: Final data entry / review settings checklist to go LIVE

GET READY: Review Program Setup and Task List

Put all your information into the program now; if you did this as you went through workbook parts 1 & 2 above, you're already there.

GET SET: Final Countdown LIVE Checklist

By now everything is setup according to plan for a successful launch.

GO! Set Starting Invoice # and Begin

This is the very last thing to do before going live.

Use space provided in this book or have program **Setup** open to each tab for entering your selections directly. This will allow you to finish and go LIVE sooner. Open **Setup** with this icon.



Note:

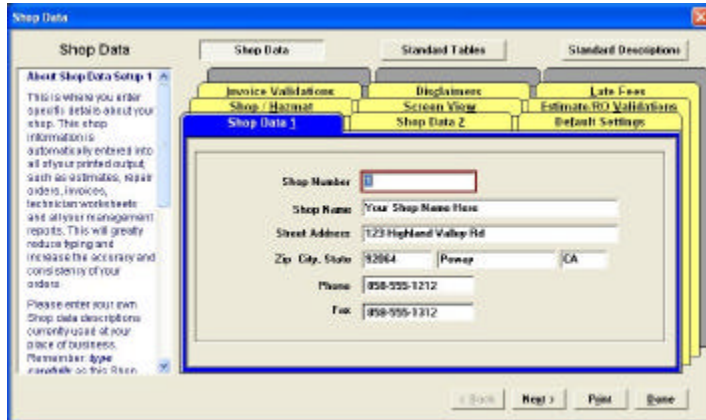
Be sure you're using the live program for all of these exercises. If it says Demo at the bottom of your screen, exit demo and click on Program icon.

Section 1: Basic Rep-Assisted Setup Areas

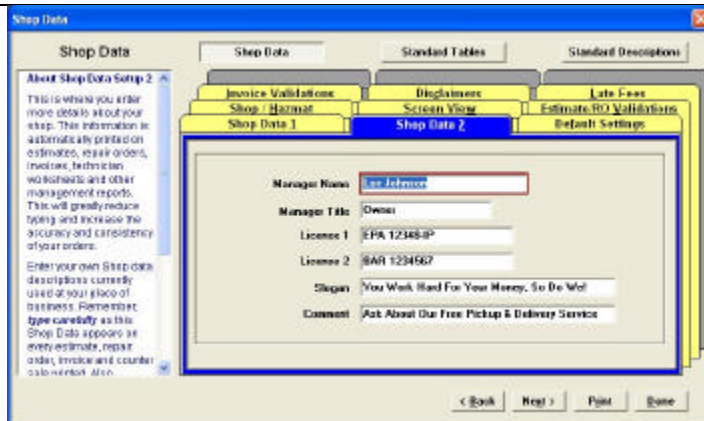
Your Sales Rep will assist you in these important setup activities. These activities must be completed before using ShopKey Management System in your shop.

BASICS: Shop Data 1 & 2

This is where you enter your own shop specifics; these automatically appear in all printed output (estimates, repair orders, invoices, tech worksheets, management reports, etc). **Please enter Shop Data about your shop in spaces below.**



Shop Name:
Street Address:
Zip/Postal Code:
City:
State/Prov:
Phone:
Fax:



Manager Name:
Manager Title:
License 1:
License 2:

Slogan:
Comment:

BASICS: Default Settings

Default Settings are automatic decisions for your shop. When you build an order, this default information is automatically entered for you.

Please enter your shop information in the spaces provided below.

Default Settings	Your Input or Recommend	Default Settings	Your input or Recommend
Area Code		Convert INV to RO on Change	⌘ Yes
Promised Time	5:00 PM	Warn on Program Exit	⌘ Yes
Labor Tech	Please, Select	Incl. Spouse on Invoice	⌘ Yes
Parts Tech	Please, Select	Incl. Tax in Estimates	⌘ Yes
Service Writer		Incl. Recommendation on RO	⌘ Yes
Income Account	Cash Chk CC	Update Labor Time From Total	⌘ Yes
Use Phone Mask	⌘ Yes	Don't Prompt: Tech Worksheet	⌘ No
Balance Due Warning	⌘ Yes # of Days:	Perform backups on Program: (choose at least one)	⌘ on Exit
		Locations (backup drive path)	(E:, etc)

Note: We recommend entering 'Please Select' as Labor Tech, so Pay hrs & Actual hrs fill in automatically; also provides labor cost for F12 Profit Wizard.

You MUST backup the management program on a daily basis. To protect your business data assets, an Iomega Zip drive or USB Flash drive is best. We strongly recommend using more than one disk for data integrity.

We **DO NOT** recommend tape drives or CD-RW drives as they don't start automatically and may not perform as expected. ZIP drives and Flash drives are fast, easy to use and give everyone one less thing to worry about!

BASICS: Shop/Hazmat

Program can be set to automatically add **Shop Supplies** and **Hazardous Material** charges to any Estimate, Repair Order or Invoices created.

NOTICE: Some states require shops to itemize shop supplies. If so, we recommend turning Shop Supplies Default setting to **Off**, add shop supply line items as parts or a part kit to recover your legitimate shop costs and satisfy this legal requirement.

With Defaults 'ON', calculated shop supplies and/or hazmat charges are added to orders based on these settings. These charges can always be turned off at Order level (*that specific order only*), using Order Options.

Shop Supplies	
% of Sales	%
Percent of ...	⌘ Labor Sales ⌘ Parts Sales
Minimum	\$
Maximum \$	\$
Account Class	Shop Supplies Revenue
Report Description (Estimate/RO/Inv text)	Shop Supplies
Default Setting	On Off
Taxable	Yes No
Hazardous Materials	
% of Sales	%
Percent of ...	⌘ Labor Sales ⌘ Parts Sales
Minimum	\$
Maximum \$	\$
Account Class	HazMat Revenue
Report Description (Estimate/RO/Inv text)	Hazardous Materials
Default Setting	On Off
Taxable	Yes No
Include Sublet (more dollars for calculations)	Yes No

BASICS: Disclaimers

Disclaimers provide placeholders for your legal disclaimer information on Estimates, Repair Orders, Invoices and Counter Sales. These always appear at the bottom of your printouts. Please attach a clean, readable copy of a shop invoice to this page.

Your program comes with “generic” standard disclaimers. You can customize these or rewrite them entirely. For Spell Check function, press the **F2** key.

Note:

Ensure that all your disclaimers are written in accordance with your local, state and federal laws.

The screenshot shows the 'Disclaimers' screen with four tabs: Estimate, Repair, Invoice, and Counter Sale. The 'Estimate' tab is selected. The text area contains a disclaimer for an estimate, followed by a 'TEARDOWN ESTIMATE' section. At the bottom, it says 'F2 for spell check' and 'Maximum # of characters - 1100'.

The screenshot shows the 'Disclaimers' screen with the 'Repair' tab selected. The text area contains a disclaimer for a repair. At the bottom, it says 'F2 for spell check' and 'Maximum # of characters - 800'.

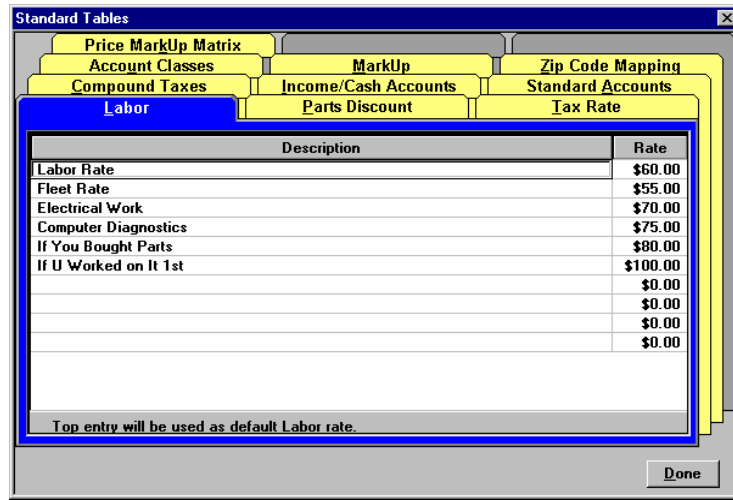
The screenshot shows the 'Disclaimers' screen with the 'Invoice' tab selected. The text area contains a disclaimer for an invoice. At the bottom, it says 'F2 for spell check' and 'Maximum # of characters - 550'.

The screenshot shows the 'Disclaimers' screen with the 'Counter Sale' tab selected. The text area contains a disclaimer for a counter sale. At the bottom, it says 'F2 for spell check' and 'Maximum # of characters - 550'.

BASICS: Labor Rates

Labor Table stores up to 10 different shop labor rates for use.

Customers can be defined with any of these labor rates as default for their estimates, orders & invoices. That's less to remember every time!



The screenshot shows a software window titled "Standard Tables" with a tabbed interface. The "Labor" tab is selected. The table contains the following data:

Description	Rate
Labor Rate	\$60.00
Fleet Rate	\$55.00
Electrical Work	\$70.00
Computer Diagnostics	\$75.00
If You Bought Parts	\$80.00
If U Worked on It 1st	\$100.00
	\$0.00
	\$0.00
	\$0.00
	\$0.00

Below the table, a note states: "Top entry will be used as default Labor rate." A "Done" button is located at the bottom right of the dialog.

Note:

Line 1 is always the default Labor Rate and is added automatically unless you choose otherwise.

Please enter Labor Rates currently used in table below.

Labor Rate Table	
Labor Rate Descriptions	Labor Rate (\$ per hr)
1. (Default) Labor Rate	\$
2.	\$
3.	\$
4.	\$
5.	\$
6.	\$
7.	\$
8.	\$
9.	\$
10.	\$

BASICS: Parts Discount Table

Parts Discount allows storage of up to 10 levels of discounts. Parts entered on an estimate or RO reflect any discount defined in customer **Type**. Prices for one or all parts can also be changed at order item level.

Description	Discount
Normal	0%
Fleet Discount Rate	10%
AARP Discount	5%
Government Discount	8%
Family Discount	10%
In-Laws	-10%
Give Me a Discount	-20%
	0%
	0%
	0%

Top entry will be used as default Parts discount.

Done

Notes:

Keep value on Line #1 at 0%, or you could end up with automatic discount on every part you sell. Negatives values (ex. -10%) will instead add percentage to normal parts charge.

Tip:

In addition to defining Discount level for customer, these values work with **Alternate Price**, found within part records in your Parts List or Inventory List.

Please enter your Parts Discount (if any) in the table below.

Parts Discount Description	Discount %
1. Normal (Default)	0% (#1 = always zero)
2.	%
3.	%
4.	%
5.	%
6.	%
7.	%
8.	%
9.	%
10.	%

BASICS: Tax Rate

Tax Rate Table allows you to maintain up to seven different tax rates. Most shops have only one. Line 1 should have 'X' in Default.

Note:

Line 1 is the default tax value. This is the global tax setting program will apply. Use **Tax** button on the Customer or Vehicle screens to make exceptions. Each Order item (part, labor, etc) has **Tax** button.

Compound Taxes (Canadian) PST-GST is added using #6 and #7.

	Description	Material Rate	Labor Rate	Default	GL Code
1	Sales Tax	7.750%	0.000%	X	20030
2		0.000%	0.000%		
3		0.000%	0.000%		
4		0.000%	0.000%		
5		0.000%	0.000%		
6		0.000%	0.000%		
7		0.000%	0.000%		

Tax #6 and #7 are Compound Taxes

Note: Program ships with Tax flag on. Tax will be **0%** until you enter current tax rate. You can change any customer to non-tax status later.

Please enter the Tax Rate(s) you currently use below.

Tax Rate Description	Material Rate	Labor Rate	Default
1. Sales Tax	%	%	X
2.	%	%	

BASICS: Compound Taxes

Compound Taxes Table allows you to set up compound or excise taxes at the Inventory/Parts List level if you are required to do so. This might be tires with an Excise Tax as percentage. If the tire tax is flat amount, create a 'tax part' and use Attached Part method.

Note:

Inventory/Parts List items must have these taxes checked to use.

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

	Description	Rate %	GL Code
Tax #1	Excise Tax	2.000	10000
Tax #2		0.000	

Please enter your Compound Tax rates (if any) in the table below.

Description	Rate %	GL Code
Tax #1		
Tax #2		

BASICS: Income/Cash Accounts (Payment Types)

Income Accounts are the General Ledger (GL) account numbers where revenues are grouped for accounting purposes. Be sure these accounts are setup accurately before going LIVE.

Cash Accounts are various forms of payment from a customer. This is where you would add a credit card, debit card, any new payment type.

You may add/edit/delete these codes and descriptions in the table below.

Note:

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

Class Description	GL Code
Cash Revenue	40710
HazMat Revenue	40300
Sublet - Discounted	40115
Labor Revenue	40100
Labor Revenue Non-Taxable	40110
Late Fee Revenue	41000
Parts - Discounted	40515
Parts Revenue	40500
Parts Revenue Non-Taxable	40510
Shop Supplies Revenue	40900
State Inspection Sales	42101
Towing Revenue	40300

Class Description	GL Code
American Express	10100
Cash	10100
Check	10100
Debit Card (ATM)	10100
Discover	10100
MasterCard	10100
Novus	10100
Oil Company Card	10100
Visa	10100
Warranty	10000

Please edit/add any additional Income or Cash Account(s) below.

Income Accounts	Cash Accounts (Payment Types)
Parts Revenue	Cash
Parts Revenue – Non-Taxable	Check
Labor Revenue	Visa
Labor Revenue – Non-Taxable	MasterCard
Late Fees (*ADD if using Late Fees)	Discover
Shop Supplies Revenue	American Express
HazMat Revenue	Charge
Sublet Revenue	ATM /Debit Card
Sublet Revenue – Non-Taxable	BP/Amoco Card
Towing	
Warranty	
State Inspection Fees	
Tire Disposal Fee	

BASICS: Standard Accounts

Standard Accounts is where you enter general ledger codes for Accounts Receivable, Customer Deposits, and Retained Earnings. Most shops will use the default values.

Note:

Changes made later will affect the accuracy of your reports.

The screenshot shows the 'Standard Accounts' window with the following GL codes entered:

Account Name	GL Code
Accounts Receivable	1111
Customer Deposits	2000
Retained Earnings	3000
Applied Credit	6000

BASICS: Account Classes (Revenue)

Account Classes area allows the selection of which accounts the shop invoice revenues will flow into.

Note:

In most shops, these account class assignments typically match the descriptions in the default list created in Income/Cash Accounts section. (Please refer to next page)

The screenshot shows the 'Account Classes (Revenue)' window with the following selections:

Category	Selected Account
Labor (Taxable)	Labor Revenue
Labor (Non-Tax)	Labor Revenue Non-Taxable
Parts (Taxable)	Parts Revenue
Parts (Non-Tax)	Parts Revenue Non-Taxable
Sublet	Sublet Revenue
Discount (Parts)	Parts - Discounted
Discount (Labor)	Labor - Discounted

Please review suggested selections shown here, noting any changes you'd make to your specific system.

It would be necessary to return to Income Cash Accounts to create any special account(s) to appear in the drop-down lists seen here in Account Classes.

BASICS: Markup

In **Markup**, you can enter your shop's Markup percentages. In the sample shown, a Sublet item of \$50 cost is being marked up 25% to automatically bill out at \$62.50.

You can also markup **OE** Parts and Labor transferred from Estimating Module (if installed). An OEM part with \$100 list would transfer into an estimate as \$110 (@10% Markup). Labor hrs would transfer at face value. (adding 10% on a 1.0 hr item would result in 1.1 hrs)

The screenshot shows a software window titled 'Markup'. It has a menu bar with 'Shop Data', 'Standard Tables', and 'Standard Descriptions'. Below the menu bar are several tabs: 'Price Markup Matrix', 'Account Classes', 'Composite Taxes', 'Labor', 'Parts Pricing', 'Markup', 'Income Cash Accounts', 'Parts Discount', 'Zip Code Mapping', 'Standard Accounts', and 'Tax Rate'. The 'Markup' tab is selected. The main area of the window is titled 'Display Information As...' and has two radio buttons: 'Markup' (selected) and 'Profit'. Below this are five input fields: 'Sublet %' with the value '25.00', 'Parts Guide %' with '10.00', 'Labor Guide %' with '0.00', 'Shop Overhead %' with '5.00', and 'Miscellaneous Overhead %' with '2.00'.

Note: Shop Overhead % + Misc. Overhead % do not directly affect prices on orders. These are used only to give the Profit Wizard realistic numbers to reflect your true cost of doing business.

Business Tip:
See **Markup Percentage vs. Gross Profit** discussion on following page for a story about the contrast between these two very different approaches.

Please enter your Markup and Overhead percentages below.

You may enter them as either Markup % OR Profit %. Whichever method you select, the matching values calculate automatically.

Please refer to Markup Matrix topic for aftermarket catalog parts.

	Markup %	Profit %
Sublet %		
Parts Guide %		
Labor Guide %		
Shop Overhead %		
Miscellaneous Overhead %		

What is the Difference between Markup percent vs. Gross Profit?

Continue on to the next page where we've provided an example story, illustrating the difference between Markup Percentage and Gross Profit.

Markup Percentage vs. Gross Profit

Act I: Markup Part by Percentage

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

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

Act II: Discounting “Marked Up” Parts

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

Question: *Is this why Joe has a hard time making ends meet?*

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

Act III: Using Gross Profit to Determine Retail Selling Price

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

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

Act IV: Discounting After Using Proper Gross Profit

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

Retail Selling Price	Discount %	Discounted Price
\$166	30% (-\$49.80)	\$116.20

Parts Markup & Gross Profit Projections Table

% Added to Cost of Part	Gross Profit Part Sale	% Added to Cost of Part	Gross Profit Part Sale	% Added to Cost of Part	Gross Profit Part Sale
30%	23.1%	50%	33.3%	70%	41.2%
31%	23.7%	51%	33.8%	75%	42.9%
32%	24.2%	52%	34.2%	80%	44.4%
33%	24.8%	53%	34.6%	85%	45.9%
34%	25.4%	54%	35.1%	90%	47.4%
35%	25.9%	55%	35.5%	95%	48.7%
36%	26.5%	56%	35.9%	100%	50%
37%	27.1%	57%	36.3%	125%	55.6%
38%	27.5%	58%	36.7%	150%	60%
39%	28.1%	59%	37.1%	175%	63.6%
40%	28.6%	60%	37.5%	200%	66.6%
41%	29.1%	61%	37.9%	225%	69.2%
42%	29.6%	62%	38.2%	250%	71.4%
43%	30.1%	63%	38.6%	275%	73.3%
44%	30.6%	64%	39%	300%	75%
45%	31.0%	65%	39.4%	325%	76.5%
46%	31.5%	66%	39.8%	350%	77.8%
47%	32.0%	67%	40.1%	375%	78.9%
48%	32.4%	68%	40.5%	400%	80%
49%	32.9%	69%	40.8%	500%	83.3%

Markup is the *percentage of the amount you earn on the cost* of an item to you. This is your Markup on part cost.

Gross Profit is the *percentage of the amount you earn on the selling price* of the item. Gross profit tells you what you retain on each sales dollar.

BASICS: Price Markup Matrix

Price Markup Matrix allows you to scale parts markup according to what you paid for each part. In other words, parts that cost less than a dollar are marked up at a much higher rate than a part that costs \$100. We recommend using several levels to remain both profitable & competitive.

Changes made to the matrix can be applied to parts by clicking on **Apply Matrix**.

#	From	To	Markup	Profit Margin
1	\$0.00	\$0.49	300.00%	75.00%
2	\$0.50	\$0.99	200.00%	66.67%
3	\$1.00	\$4.99	100.00%	50.00%
4	\$5.00	\$9.99	75.00%	42.86%
5	\$10.00	\$19.99	70.00%	41.18%
6	\$20.00	\$49.99	65.00%	40.00%
7	\$100.00	\$299.99	60.00%	37.50%
8	\$300.00	\$499.99	50.00%	33.33%
9	\$500.00	\$9,999.99	40.00%	28.57%
10	\$0.00	\$0.00	0.00%	0.00%

In Management System, you have capability of using Last Cost or Average Cost. This is significant because:

- 1) Inventory parts can be set to transfer with either average cost or last cost applied. This makes a difference on invoice profitability reporting.
- 2) Last cost may place part into a different (higher) bracket and receive a different (smaller) markup than expected.

Please enter your own Markup or Margin selections below.

Price Markup Matrix				
Range	From	To	Markup	Profit Margin
1.	\$0.00	\$	%	%
2.	\$	\$	%	%
3.	\$	\$	%	%
4.	\$	\$	%	%
5.	\$	\$	%	%
6.	\$	\$	%	%
7.	\$	\$	%	%
8.	\$	\$	%	%
9.	\$	\$	%	%
10.	\$	\$	%	%

BASICS: Parts Pricing

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

Price = calculated as Cost times the Markup Matrix. (setup in previous section.)

List = the Manufacturer's Suggested Retail Price (MSRP).

Standard Tables

Shop Data | Standard Tables | Standard Descriptions

Parts Pricing

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

Price = calculated as Cost times the Markup Matrix. (To set or change the Markup Matrix, go to the Price Markup Matrix tab in the Standard Tables under Setup.)

List = the Manufacturer's Suggested Retail Price (MSRP).

A complete definition of terms is provided at the end.

Sale amount will be calculated as either List or Price.

Calculate the part's Sale amount based on:

☒ Price

☐ List

< Back | Next > | Print | Done

When the radio button selection is changed, the rules for the new selection will go into effect. The new rules will apply to newly created Estimates and Repair Orders. The new rules will not affect Estimates, Repair Orders, or Invoices created prior to this change. If a prior order is opened and a part's line item is edited or added, the new rules will apply only to that part's line item. When a part from a canned job, parts kit, or inventory (ShopKey Management System only) are added to an order, the part's Sale amount will reflect the current rules.

The program will attempt to ensure you don't end up with a Sale amount of zero. If you chose to calculate Sale based on List and no List amount has been entered for the part, the program will use the Price to calculate the Sale amount. If you chose to calculate Sale based on Price and no Price amount has been entered for the part, the program will use the List amount. Refer to the User Guide and Online Help for more detailed information/definitions.

BASICS: Technicians Setup

Technicians Setup allows you to add, edit or delete Technician (employee) information. We have supplied room on the following page to write in information for two technicians. Enter data for two technicians here and any remaining technicians as part of your Get Ready task list to go LIVE.




The screenshot shows a menu with three tabs: 'Setup', 'Utilities', and 'Inventory'. Under the 'Setup' tab, there are four options: 'Standard Descriptions', 'Standard Tables', 'Shop Data Setup', and 'Technicians Setup'. The 'Technicians Setup' option is highlighted with a blue background.

Technician Setup information provides the basis for the Technician Commission Report. It also helps you figure out your shop's profit margin on a job with the **F12** Profit Wizard.

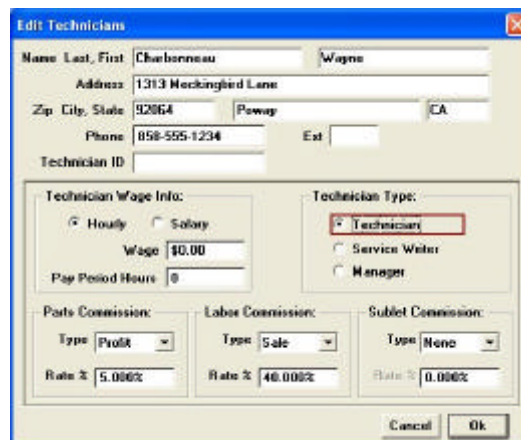
Note:

Some employees may require more than one entry. If a service writer-manager occasionally gets a labor commission for work, he would be setup twice; once as a Tech and again as Service Writer-Manager.



The screenshot shows the 'Technicians Setup' window with a table listing technicians. The table has two columns: 'Name' and 'Technician Type'. The 'Ok' button is highlighted with a red box.

Name	Technician Type
Charbonneau, Wayne	Technician
Darin, Dan	Service Writer
DiVerde, Nick	Technician
Dwulet, John	Manager
Johnson, Tim	Technician
McDonnell, Tim	Service Writer
Please, Select	Technician
Warfield, Brian	Technician



The screenshot shows the 'Edit Technicians' window for Wayne Charbonneau. The 'Technician Type' is set to 'Technician' (highlighted with a red box). The 'Wage' is \$0.00 and the 'Pay Period Hours' is 0. The 'Parts Commission' is set to 'Profit' with a rate of 5.0000%. The 'Labor Commission' is set to 'Sale' with a rate of 40.0000%. The 'Sublet Commission' is set to 'None' with a rate of 0.0000%.

Name Last, First: Charbonneau, Wayne
Address: 1313 Mockingbird Lane
Zip City, State: 92064 Poway CA
Phone: 618-555-1234 Ext:
Technician ID:
Technician Wage Info:
☒ Hourly ☐ Salary
Wage: \$0.00
Pay Period Hours: 0
Technician Type:
☒ Technician ☐ Service Writer ☐ Manager
Parts Commission:
Type: Profit
Rate %: 5.0000%
Labor Commission:
Type: Sale
Rate %: 40.0000%
Sublet Commission:
Type: None
Rate %: 0.0000%
Buttons: Cancel, Ok

On the next page, blank Add Technician screens are provided for you to pencil in information for adding details for two technicians.

BASICS: Technicians Setup (Cont.)

Enter two technicians now and any remaining technicians later, during your Get Ready checklist at the end of the book.

You may also enter your technician data directly into your program now.

Note:

"Type" is selection of commission type for the technician on Sale (total \$), Profit on a job or none.

Add Technician

Name Last, First: _____
Address: _____
Zip City, State: _____
Phone: 858-____-____ Ext: _____
Technician ID: _____

Technician Wage Info:
☒ Hourly ☐ Salary
Wage: \$0.00
Pay Period Hours: 0

Technician Type:
☒ Technician
☐ Service Writer
☐ Manager

Parts Commission:
Type: None
Rate %: 0.000%

Labor Commission:
Type: None
Rate %: 0.000%

Sublet Commission:
Type: None
Rate %: 0.000%

Cancel Ok

Add Technician

Name Last, First: _____
Address: _____
Zip City, State: _____
Phone: 858-____-____ Ext: _____
Technician ID: _____

Technician Wage Info:
☒ Hourly ☐ Salary
Wage: \$0.00
Pay Period Hours: 0

Technician Type:
☒ Technician
☐ Service Writer
☐ Manager

Parts Commission:
Type: None
Rate %: 0.000%

Labor Commission:
Type: None
Rate %: 0.000%

Sublet Commission:
Type: None
Rate %: 0.000%

Cancel Ok

BASICS: Reports/Printers

Reports/Printers area defines which style of printout, printer used and how many copies to print. Default Print to Screen provides a preview.

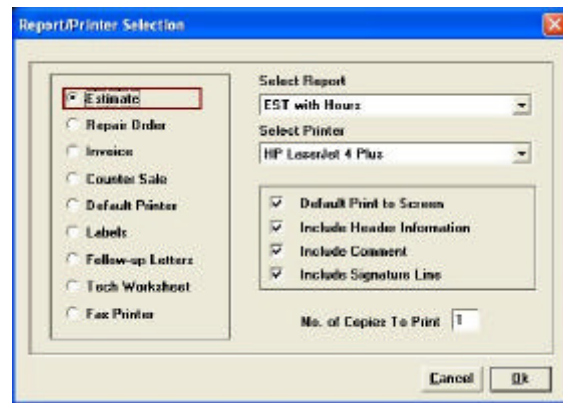
If Default to Screen (Preview) is used, it will be necessary to manually increase print quantities above one copy. Once users are comfortable with the program, you may turn Default to Screen off. Program will then automatically print the quantity requested in Reports/Printers setup.



Report/Printers - Estimates

Select the printer and report type to complete your selections.

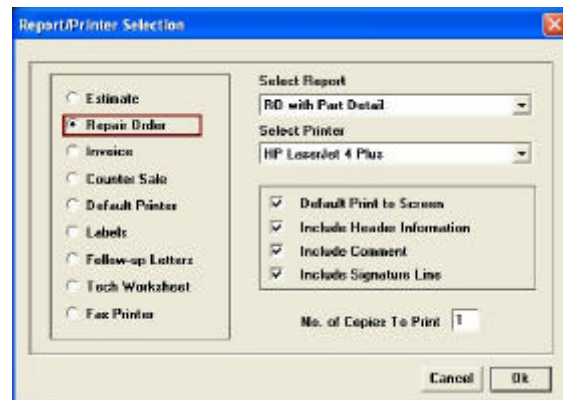
Mitchell recommends printing two estimate copies; for both customer and shop and two invoice copies (customer and file).



Report/Printers - Repair Orders

Select the printer and report type to complete your selections.

Microsoft® Windows® will provide default printer automatically, but you may select different printers for the various types of reports.



BASICS: Reports/Printers (Cont.)

Report/Printers - Invoice

Select the printer and report type to complete your selections.

Mitchell recommends printing two invoice copies; for customer and shop's file.

The screenshot shows the 'Report/Printer Selection' dialog box. On the left, a list of report types includes 'Invoice', which is selected and highlighted with a red box. Other options are 'Estimate', 'Repair Order', 'Counter Sale', 'Default Printer', 'Labels', 'Follow-up Letters', 'Tech Worksheet', and 'Fax Printer'. On the right, the 'Select Report' dropdown is set to 'INV w/o Hours'. The 'Select Printer' dropdown is set to 'HP DeskJet 895Cxi'. Below these, there are three checked options: 'Default Print to Screen', 'Include Header Information', and 'Include Comment'. The 'Include Signature Line' option is unchecked. At the bottom, the 'No. of Copies To Print' is set to 1. 'Cancel' and 'Ok' buttons are at the bottom right.

Report/Printers – Labels

Select the printer and report type to complete your selections.

The screenshot shows the 'Report/Printer Selection' dialog box. On the left, 'Follow-up Letters' is selected and highlighted with a red box. On the right, the 'Select Report' dropdown is set to 'Stock paper letter w. vehicle'. The 'Select Printer' dropdown is set to 'HP LaserJet 4 Plus'. Below these, 'Default Print to Screen' is checked, while 'Include Header Information', 'Include Comment', and 'Include Signature Line' are unchecked. The 'No. of Copies To Print' is set to 1. 'Cancel' and 'Ok' buttons are at the bottom right.

Report/Printers – Technician Worksheet

Select the printer and report type to complete your selections.

Repeat this process for your **Counter Sale**, **Default Printer**, **Labels** and **Fax Printer** (all not shown here) as needed.

The screenshot shows the 'Report/Printer Selection' dialog box. On the left, 'Tech Worksheet' is selected and highlighted with a red box. On the right, the 'Select Report' dropdown is set to 'Expanded Worksheet w. Charged hours'. The 'Select Printer' dropdown is set to 'HP LaserJet 4 Plus'. Below these, 'Default Print to Screen' is checked, while 'Include Header Information', 'Include Comment', and 'Include Signature Line' are unchecked. The 'No. of Copies To Print' is set to 1. 'Cancel' and 'Ok' buttons are at the bottom right.

BASICS: End of Day Reports

The **End of Day Reports** setup is where you select which reports will be run automatically (as batch operation) at the end of your business day. The example below has several reports “tagged” to be run at closing time.

This batch operation saves precious time at the end of every business day. Additional reports may be run from the Reports icon at any time.

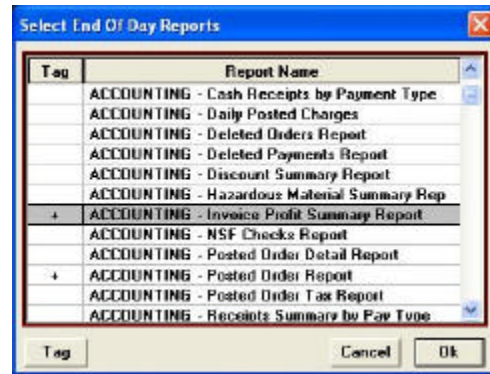


Consider which reports you want to run on a daily basis.

Then select or de-select your reports by highlighting each line and clicking on the Tag button or double-click on highlighted line.

Note:

When using LIVE program, you'll trigger End of Day Reports process by clicking on **Utilities** and selecting **End of Day Reports**.

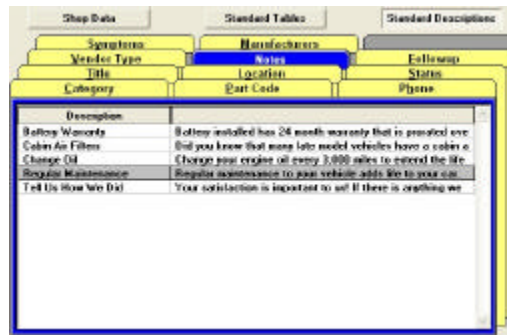


BASICS: Notes

Time-saving **Notes** will attach to orders with just a mouse click. These notes are helpful reminders to customers or direct advertising about special discounts or stored list of your **Recommendations!**

Note:

Program comes with some notes already prepared. Enter Notes into program now or add some later.



This concludes rep-assisted setup, please continue on with Self Setup.

Section 2: Self Setup Options

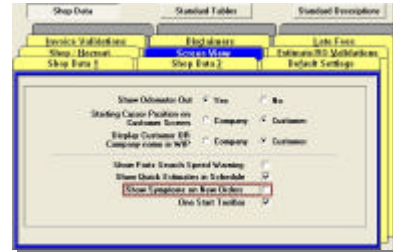
Although you've worked through the basics with your rep, you should continue working through the following section for maximum benefits from your program.

Screen View

Screen View is another way to customize what you can see or how the program works.

Show Symptoms on New Orders will make a Symptoms screen pop-up display when you start a new order.

One Start Toolbar creates the (F6) Start icon to start Estimates and Repair Orders faster.



Screen View	Recommended	
Show Odometer Out	<u>Yes</u>	No
Starting Cursor Position on Customer Screen	Company	<u>Customer</u>
Display Customer - Company Name in WIP Screen	Company	<u>Customer</u>
Show Parts Search Speed Warning	Yes	<u>No</u>
Show Quick Estimates in Schedule	Yes	<u>No</u>
Show Symptoms on New Orders	Yes	<u>No</u>
One Start Toolbar	<u>Yes</u>	No

Estimate/RO Validations & Invoice Validations

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



Note: By default, ALL validations are automatically enabled. We recommend leaving all of these warnings turned on, unless you have a specific reason not to use any validation(s). If any of these pop-up, pressing Enter allows users to continue on to the printing process.

Late Fees

Late Fees option provides users with a method to automatically calculate late charges for customer charge accounts. Once you've read the important NOTICE below, place a check in **Apply Late Fees** to activate and begin setup process.

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

NOTICE: Before enabling this feature, you must consult local and state regulations regarding late fee practices. Please be advised that Mitchell 1 is not responsible for ensuring your compliance with state and/or other law regarding the assessment of late fees or other interest charges on outstanding invoice amounts. Mitchell 1 will not be held accountable for any misuse and/or failure to comply and will not be responsible for any consequential financial or legal implications.

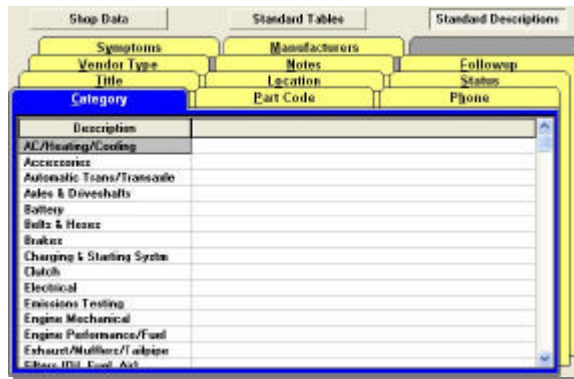
Late Fee Setup Values	
Account	Late Fees
Fee Reminder Day	None 1 st 15th
Ignore Cumulative Overdue Balances if Below This Amount	\$
Fee Assessment Options	Flat Fee or % of Balance
Amount	Fee \$ APR %
Maximum Fee	\$
Minimum Fee	\$

Category

Category descriptions are helpful to organize and filter parts & labor items for faster access when estimating.

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

Use the sample Categories, edit them or delete them.

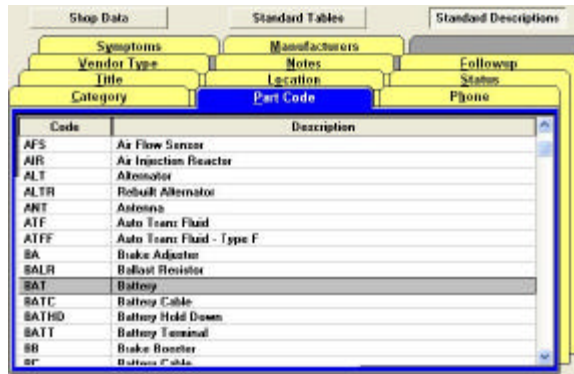


Add your own Category Descriptions below or directly into program.

Category Descriptions (Write in Your New Categories, if any)	

Part Code

Part Codes are abbreviations to help you enter parts faster. When adding a part to an estimate, by typing **BAT** into Part Code, the Description (**Battery**) fills automatically. Part Codes can also be set to fill in the related Category and Vendor information.



Note:

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

Add your own Part Codes (if any) directly into the program.

Phone

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

The program comes loaded with all the descriptions you are most likely to use. We recommend leaving them exactly as they appear here.

The screenshot shows a software interface with three tabs at the top: 'Shop Data', 'Standard Tables', and 'Standard Descriptions'. The 'Standard Descriptions' tab is active. Below the tabs are three sub-tabs: 'Symptoms', 'Manufacturers', and 'Followup'. The 'Followup' sub-tab is active. Under 'Followup', there are three sub-sub-tabs: 'Vendor Type', 'Location', and 'Phone'. The 'Phone' sub-sub-tab is active. The main area displays a table with the following structure:

Description	
Home	
Office	
Spouse	
Cellular	
Beeper	
Service	
VoiceMail	
Pager	
Office 2	

Warning!

Do **NOT** change or re-arrange these once customer phone numbers have been entered. You risk mixing up these labels as to which phone numbers they truly belong to.

Title

Title descriptions allow you to create or remove standard salutations for customers. The program doesn't require you to enter titles for your customers. This is optional.

Program comes with a list of Title descriptions. For most customers, provided Titles work fine. You can edit or delete Title descriptions as necessary.

The screenshot shows the same software interface as the Phone section, but with the 'Title' sub-sub-tab active. The main area displays a table with the following structure:

Description	
Mr.	
Ms.	
Miss	
Mrs.	
Dr.	
Rev.	
Sgt.	
Captain	

Be sure to leave the first line in this table blank.

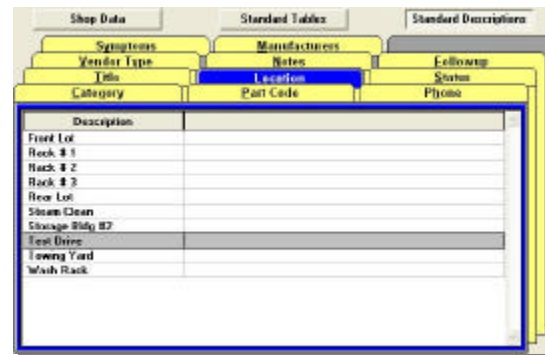
Location

Location descriptions are used to help keep track of where vehicles are located at your business. These can be very important to a large shop with multiple parking areas.

You can add/edit/delete descriptions of common vehicle locations in or around your shop at any time.

Note:

Program comes with a list of Location descriptions. This will be an item on your Get Ready checklist.



Status

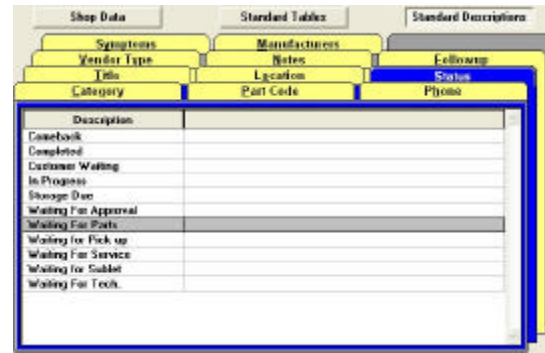
Status allows you to maintain a common set of repair status descriptions. These are handy for the service writer or manager when customers call about their vehicle.

You may add/edit/delete these as you wish at any time. Add

Comeback so you can note these on your Work-In-Progress screen.

Note:

Program comes with a list of Status descriptions. This will be an item on your Get Ready checklist.

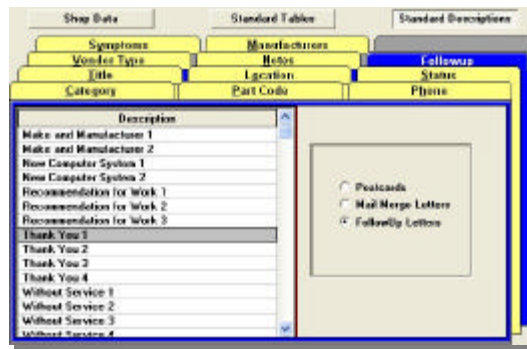


Follow-up (Postcards, Letters and Mail-Merge)

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

Program comes with sample Follow-up Postcards and Letters, which you may add/edit/delete.

Refer to your *User's Guide* for more detailed information.



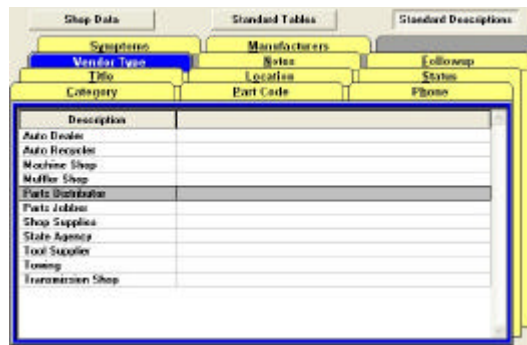
Note:

MS Mail Merge requires Microsoft **Word97 or newer**. Refer to the User Guide for further information.

Vendor Type

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

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



Symptoms

Symptoms can save shops many keystrokes when estimating.

With Symptoms, you're speaking the customer's language right away, making it easier to receive the vehicle and standardize your labor charges. Use a Symptom now and then apply it to a costlier repair. It also curbs the habit of giving diagnostic time away.

Note: You may also add these on the fly with the Order Screen Symptoms button.

Short Description	Category	Hours	Labor	Parts
AC Won't Cool	AC/Heating/Cooling	1.00	\$60.00	\$0.00
Engine Hiccups	AC/Heating/Cooling	0.75	\$45.00	\$0.00
Shifting - No	Automatic Trans/Transaxl	1.00	\$60.00	\$0.00
Clutch - Free	Automatic Trans/Transaxl	1.00	\$60.00	\$0.00
Trans Hicc	Automatic Trans/Transaxl	1.00	\$60.00	\$0.00
Bell Squeal	Bells & Hoses	0.50	\$30.00	\$0.00
Brake Noise	Brakes	0.50	\$30.00	\$0.00
Brake Pedal Soft-Sinks	Brakes	0.50	\$30.00	\$0.00
Brake Warning Light On	Brakes	0.50	\$30.00	\$0.00
Park Brake Won't Hold	Brakes	0.50	\$30.00	\$0.00
Vehicle Pulls Left	Brakes	0.50	\$30.00	\$0.00
Vehicle Pulls Right	Brakes	0.50	\$30.00	\$0.00

Add your own Symptoms below or directly into your program.

Symptoms Descriptions	
Short Description: Symptom: Work Requested: Category: Charged Hrs: Labor Total \$: Estimated Part \$: (optional)	Short Description: Symptom: Work Requested: Category: Charged Hrs: Labor Total \$: Estimated Part \$: (optional)
Short Description: Symptom: Work Requested: Category: Charged Hrs: Labor Total \$: Estimated Part \$: (optional)	Short Description: Symptom: Work Requested: Category: Charged Hrs: Labor Total \$: Estimated Part \$: (optional)

Program Security

This allows the shop owner or manager to password protect sensitive information. For example, most shops don't want technicians knowing how much the shop pays other technicians or marking up parts & sublets.

The Program Security feature allows the shop owner/manager to specify who can delete orders or payments, see (F12) Profit Wizard, review Technician pay, etc.

Master password is for owner/managers and lesser password levels for employees. For a detailed description of Program Security, consult the User's Guide.

Note:

If you enter or change the master password, **be sure to write it down** for later reference.



Promotions: Packages & Discounts

Packages are parts and labor operations which are grouped together and sold for a (usually discounted) single price. These 'vanilla' packages transfer as single line entries. You may optionally add the parts & labor details later, but customers will still see only a single line on the invoice that you created in Package setup.

Discounts apply a flat dollar amount **or** percentage discount to the parts and/or labor on an order. For example, you might offer a 10% discount to all AARP members.

Discount appears as line item note on order grid and RED column in running totals. Packages and Discounts are applied via the **Promotions** button on **Order** screen.

Go to Setup, select Packages & Discounts, and select Discounts or Packages tab. Then use Add/Edit to modify entries as desired.



Promotions: Tire Packages

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

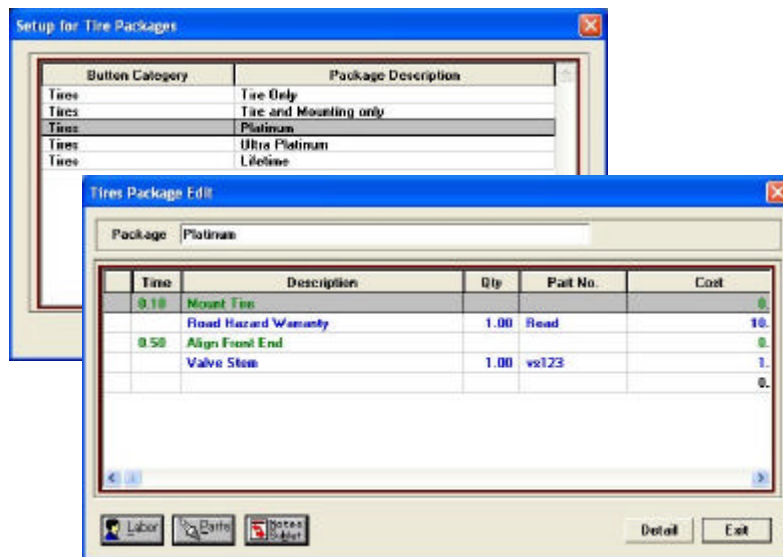
To add or edit a Tire Package, select Tire Packages from Setup menu and then **Add/Edit** in Tire Packages Edit dialog box.

Your program comes equipped with sample packages for Tire Only, Tire and Mounting only, Platinum, Ultra Platinum, and Lifetime packages. Edit these packages as desired.

Please note that any additional taxes or disposal fees may be created at the Tire Package level or individual tire part records.



☒ **Tire** This setting insures that part record appears within tire selection list.



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

For a detailed description of setting up and applying Tire Packages, consult the User's Guide, Self-Instruction Guide, Help [F1], or Training Videos.

Promotions: Brake Packages

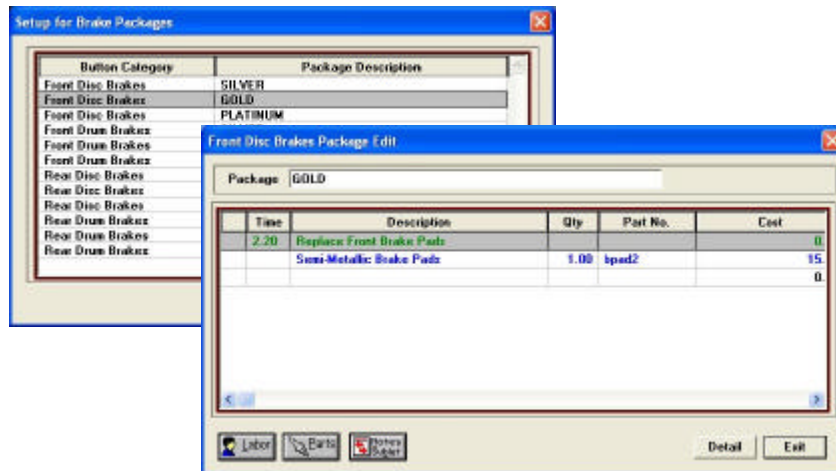
Brake Packages are groupings of brake part and labor operations to create packages of varying levels to offer to your customers.

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

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

Please note that these are generic or representational parts that will need to be replaced with specifics on the order.

Brake Packages are applied to orders via the **Promotions** icon on the Order screen.



For a detailed description of setting up and applying Brake Packages, please consult Users Guide, Self-Instruction Guide, Help [F1], or Training Videos.

Promotions: Lube, Oil & Filter Packages

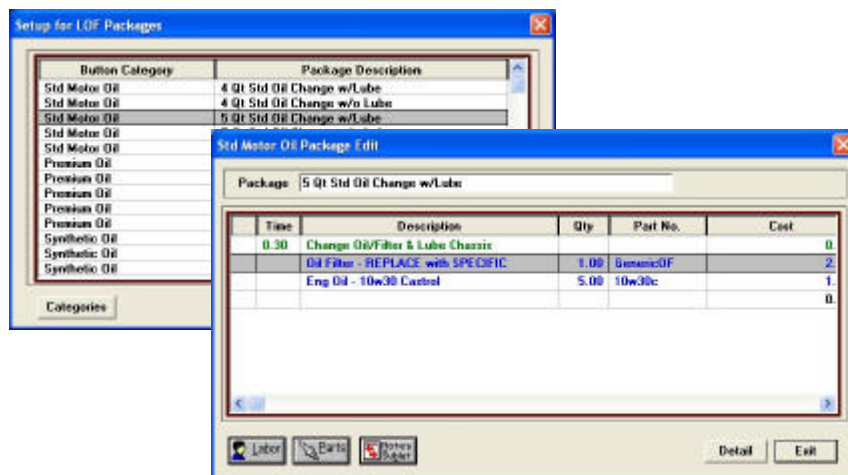
Each **LOF Package** is a grouping of fluids, parts, and labor operations to form pre-built combinations to save input & selection time.

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

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

Please note that these are generic or representational parts that will need to be replaced with specifics on the order.

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



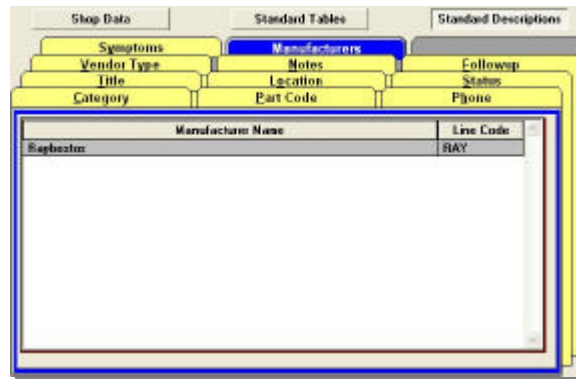
For more information on setting up and applying LOF Packages, please consult Users Guide, Self-Instruction book, Help [F1], Training Videos.

Manufacturers (Line Codes)

Manufacturer's setup allows you to enter Parts Mfg. Line Code information. This option is intended for electronic on-line parts ordering.

This field can also be useful to filter part lookups by Mfg. on Inventory List / Parts List.

You may add/edit/delete these as you wish.



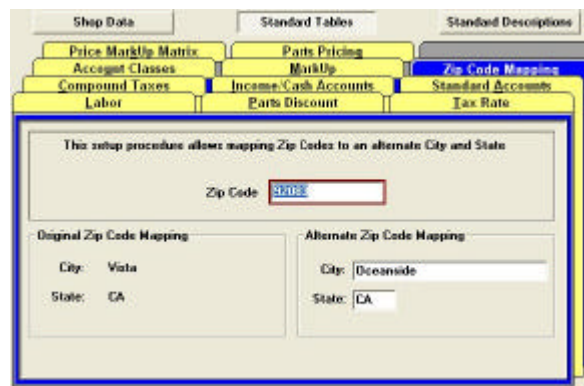
Generally, parts distributors supply a file that fills the Manufacturers Line Code list automatically to match the part lines they carry. These can also be entered manually at any time, if shop is not going to connect electronically.

Zip Code Mapping

Zip Code Mapping allows users to override the zip code database and change the City & State that is filled in when the Zip Code is entered.

Note:

This screen is also used to enter Canadian postal codes.



This completes the Self Setup section; please continue on to Section 3 to go LIVE: Get Ready, Get Set, Go!

Section 3: Get Ready, Get Set, Go LIVE

We recommend you continue working through the following section to be sure that settings are correct and your management system is ready for start date.

GET READY: Confirm Entry of Shop Information

Are We There Yet? Almost.

You've completed all Setup options; now confirm entry of all these real-world settings to make sure your live program is ready. This is not complicated. To ensure it runs as smooth as possible, spend time on this area for best results.

These steps prepare the program to get right to work for your business. They include entering customers & vehicles, technicians, vendors, parts, part kits, canned jobs and reviewing your business information (Shop Data report).

Once these areas have been considered, proceed to the Get Set Checklist.

- ✍ **Your Best Customers with All Their Vehicles Entered**
- ✍ **All Your Technicians Entered**
- ✍ **Your Vendors Entered**
- ✍ **Parts in Parts List (*Service Writer*) OR Inventory List (*Management*) Entered**
- ✍ **Part Kits & Canned Jobs Entered**
- ✍ **Your Standard (Institutional) Notes Entered**
- ✍ **Any Additional Symptoms Entered**
- ✍ **Promotions (Discount Coupons & Packages) Entered**
- ✍ **Your Specific Location & Status Information Entered**
- ✍ **Double Check Your Program Settings (*see Shop Data Report*)**
- ✍ **Two Days of Invoices Entered (*excellent practice; real data*)**

Note:

Be sure you're using the **live** program for all of these exercises. If it says Demo at the bottom of your screen, exit demo and click on Program icon.

Enter Customers & Vehicles

With this information in place, you'll see improved shop workflow right away. If typing is not your favorite task, you may want to consider hiring someone to enter it for you. The Shop Management Entry Screens (included with your Program Installation CD) may be just the answer for a person to enter this data from outside the management program. This can be installed on any PC for input tasks; then transferred to work PC. See below.

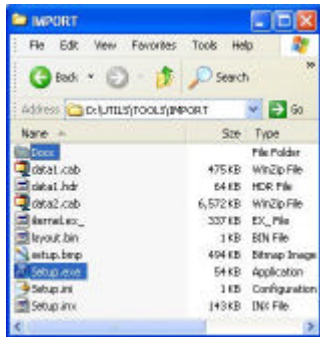
How to Enter Customers & Vehicles

1. From within management program

Use the **Utilities, Customer Screen** method to enter customers & vehicles. This is explained fully in the Self-Instruction book; review as needed.

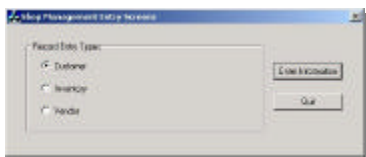
2. OPTION: Outside program – Shop Management Entry Screens

For larger input jobs to be performed outside management program, install the Shop Management Import Utility Package. See instructions below.



Import folder on install CD

NOTE: Docs folder (above) has **import.pdf** reference guide for further details on functions.

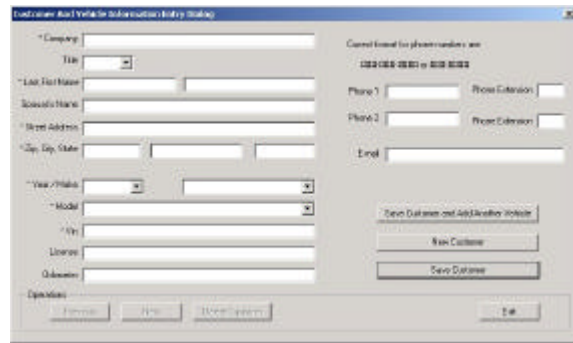


2. Select **Customers** Option

1. Insert management program install CD
2. Navigate to D:\UTILS\IMPORT
(example shown at left)
3. Double-click **Setup.exe**; select to install input screens & import utility.
4. Once installed, go to Start, Programs, find Mitchell Repair group to activate



1. Start **Entry Screens.exe** here



3. Enter Customers and Vehicles Here

Enter Your Technicians

Know Your Job Profitability: To get the benefit of Profit Wizard's ability to check job profitability, costs (parts, sublet and technician labor) must be complete and accurate. Use **Setup – Technicians Setup**.

Enter Your Vendors

When adding parts to estimates and orders, you want your Vendor names to appear on the Vendor drop-down menu. The program does NOT allow typing in this field during part entry, so Vendors should be entered now. Parts entry will go much faster. Use **Setup – Vendors Setup**.

Purchasing and Inventory. The PO system (Management System only) allows for tracking by vendor.

Warranties and Returns. Using Vendor List helps you keep track of who you bought parts from for warranty purposes, part returns & core charges.

How to Add Vendors

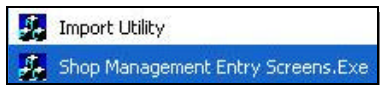
1. From within management program

Use the **Setup, Vendor Setup** method to enter vendors.

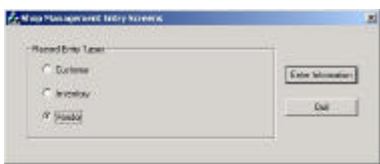
2. OPTION: Outside program – Shop Management Entry Screens

For input jobs to be performed outside management program, install Shop Management Import Utility Package. See details under Enter Customers.

*NOTE: Docs folder (install CD) has **import.pdf** reference guide for further details.*



1. Start **Entry Screens.exe**



2. Select **Vendor** Option

A screenshot of the 'Vendor Information Entry Dialog' box. It contains several input fields: 'Code', 'Name', 'Address', 'City', 'State', 'Zip', 'Contact', 'Phone1', 'Phone1 Extension', 'Phone2', and 'Phone2 Extension'. On the right side, there are 'Save Vendor' and 'New Vendor Item' buttons. At the bottom, there is a 'Operators' section with buttons for 'Previous', 'Next', 'Shop Wizard', and 'Exit'.

3. Enter **Vendors** Here

Enter Your Parts into Inventory List / Parts List

Every time you create an estimate or order, you save time by not having to enter parts information over and over again. Start with the parts you use most often, such as those listed in the table below.

Oil Filters	Trans. Fluid	Spark Plugs	Engine Oil	Air Filters
Batteries	Tires	Belts	Hoses	Coolant

You can always add other parts on the fly, but to save time you should enter as many as possible before going live. This will reduce effort.

How to Enter Parts

1a. From Within Management program

Use the **Inventory, Inventory List** method to enter parts.

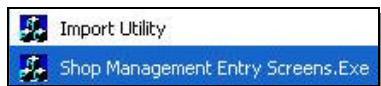
1b. From Within Service Writer program

Use the **Utilities, Parts List** method to enter parts.

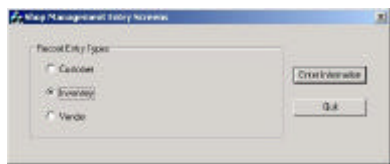
2. OPTION: Outside program – Shop Management Entry Screens

For input jobs to be performed outside management program, install Shop Management Import Utility Package. See details under Enter Customers.

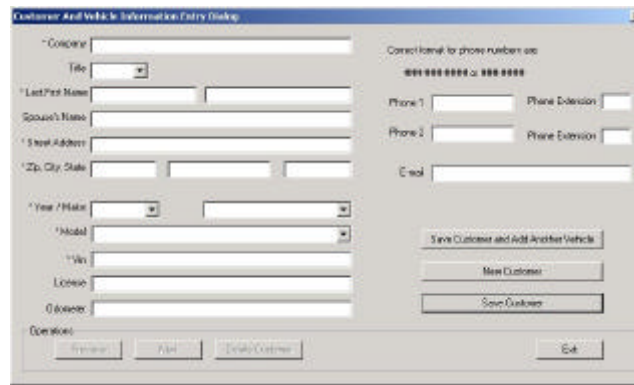
*NOTE: Docs folder (install CD) has **import.pdf** reference guide for further details.*



1. Start **Entry Screens.exe**



2. Select **Inventory** Option

A screenshot of the 'Customer And Vehicle Information Entry Dialog' form. It contains fields for Company, Title, Last First Name, Spouse's Name, Street Address, Zip, City, State, Year / Make, Model, License, and O/Vehicle. There are also phone number fields (Phone 1, Phone 2, Phone Extension) and an Email field. Buttons include 'Save Customer and Add Another Vehicle', 'New Customer', 'Save Customer', 'Previous', 'Next', 'Enter Customer', and 'Edit'.

3. Enter **Parts** Here

Build Your Own Parts Kits

Every time you use a Part Kit, you're adding multiple parts to an estimate or order with a single selection. Program can also be set to prompt you for certain parts within the Parts Kit that aren't used each and every time.

Bundled Price option is where user creates new selling price. The parts may add up to \$25.62, but clicking Bundled Price allows entry of \$24.95.

Some common examples of parts kits are provided below:

Clutch Kits	Brake Kits	Oil Change Kits	Tune-Up Kits
-------------	------------	-----------------	--------------

Build Your Own Canned Jobs

Every time you use a Canned Job, you're handling pre-built parts and labor operations for your most common jobs with a few clicks. You'll appreciate not having to re-key or transfer individual items every time. You may build a Canned Job with any combination of Parts, Parts Kits, Labor, Sublet, Notes, etc. Any kind of repair order you can put together can become a Canned Job. Are you thinking "We don't have any Canned Jobs?" There's probably a list near your Service Desk.

A/C Recharge	Inspections	Diagnostics	Tune-Ups
State Inspections	Cooling Flush	Alignment	Tire Repair

Enter Your User Notes

Less Typing. You can store and reuse many reminders, warnings, specials, even some "we appreciate your business" type messages. No more taking time to dash off a handwritten note about a vehicle hazard or missing a chance to inform your customer.

Each User Note includes a short title field to confirm you've got the right note and the main body message that will print on your estimate, order or invoice. NOTE: If you press F2, the program will check your spelling.

Enter Your Additional Symptoms

Symptoms Make Program Better Suited to Receiving Incoming Vehicles. Customers bring in vehicles because they have observed one or more problems. By having a Symptoms list, it makes it easier to receive the vehicle and get started on diagnosing the problem and later recommend more specific repairs. And because you are working with standardized labor charges, there's no guesswork or giving away shop labor.

We recommend entering any general Symptoms you may repeatedly use. This is very helpful in keeping multiple service writers aware of what the other is doing.

Enter Your Promotions (Discounts & Packages)

Program now includes specific Tires, Brakes & Lube, Oil and Filter package areas. If you decide that these more specific Promotions better fit the way you do business, refer to the Program User Manual and the Program Self Instruction Guide for more information.

Progressive repair shops know that it takes flexibility to stay on top of business. By having discount coupons and packages (specials) ready, they can satisfy needs more quickly. We recommend entering any Promotions you may use repeatedly.

Enter Your Location & Status Descriptions

Nobody Knows Your Business Like You Do. No one else has the exact same locations (stalls, parking, etc.) that you have. You may use different Status (ready, waiting on parts, etc.) comments at your shop than those provided with the program. Why not customize the program further to match how you do business?

We recommend entering all Location and Status information. This is very helpful in keeping multiple service writers aware of what others are doing.

Double Check Your Settings

For the same reason you wouldn't let a customer take a vehicle without taking it for a test drive, you need to be sure *your* settings are correct right from the start. We'll print a report with details about your program, such as settings and defaults. These save time by automatically entering the most used values. Be sure all program defaults are set properly first!

Printing the Shop Data Report

Step 1 - Click on the **Reports** icon, select the **Management** tab

Step 2 - Double click on **Shop Data Report**; program prepares the report for printing. If default Print to Screen is on, it will appear as screen preview first. Click Printer icon to create hard copy, or click 'X' to close.

Reviewing the Shop Data Report

Step 1 - Since this represents how defaults are set, please look it over very carefully. Are the right program options switched on? This data will appear on ALL paperwork, so it's crucial to be correct before you begin.

Step 2 - For changes, proceed to **Shop Data Setup** or **Standard Tables**.

Step 3 - Some additional options (**Shop Data/Default Settings**) do NOT appear on this Report. Since they also impact the program, please consider:

Shop Data Defaults	Description
<input checked="" type="checkbox"/> Bal. Due Warning on new order # days past due 30	Balance Due Warning box displays when a new order is started for any customer with overdue balance. Select # of days.
<input checked="" type="checkbox"/> Include Tax in Estimates	Check this to estimate with taxes. Note: If HazMat and/or Shop Supplies defaults are set to ON, they will be applied too.
Perform backups on: <input type="checkbox"/> Program Startup <input checked="" type="checkbox"/> Program Exit <input type="checkbox"/> End of Day Location E: (your Zip Drive)	This setting triggers a prompt to copy your database and program settings files to a backup location when you answer Yes . It is possible to select one, two or all three settings. The Iomega® ZIP® drive or USB flash drive is recommended for backup. Just enter the path (drive letter only; E:) to your backup drive in Location.

Enter 2 Days of Invoices

Become even more comfortable, while learning how program works. Since these are paid orders, you may enter them as Invoices. If you want some additional practice, enter them as Estimates or Repair Orders and then run them through the cycle to end up as Invoices. Remember to add any Recommendations and Revisions for any services not already performed.

We're also going to recommend some reports to print, so having two days worth entered will provide the means for comparison. Read through all the steps below before entering invoices.

Entering the Invoices

Step 1 - Enter one of yesterday's invoices, but DON'T Apply Payments or Post it yet. Start by entering new or existing customer & vehicle then enter all the items that were on the order. (If you need help, refer to the Self Instruction Guide.) Be sure to assign technicians to all parts & labor.

Step 2 - Click on **Options**, select **Check Profit**. Are profit percentages in line with your expectations? We recommend average 40% profit margin as a target. If any profit values are too low or too high, you need to find out why before going live.

If the profit on the parts appears low, check markup values. If the profit on labor seems too good to be true, maybe you forgot to assign a tech. Maybe it's just this invoice, but you need to be sure it's not a system setting. We recommend repeating the process with several invoices.

The best tool for any order where numbers don't look right is the Order Detail Report. With the Invoice on screen, hold down Control key (**Ctrl**) and press **F10**. This detailed report can be previewed on screen, showing how program came up with those numbers. NOTE: We recommend this report (includes Tech wages) be password protected in Program Security.

After ALL Invoices have been entered:

Step 3 - Click on **Reports**, select the **Accounting** tab.

Step 4 - Double click on any of these recommended reports:

Category Profit Summary Report	Invoice Profit Summary Report	Posted Order Report
---	--	--------------------------------

Print separate reports for each of the two days and compare the totals.

Step 5 - Set dates in Date Range box to match your invoices, click **OK**.

GET SET: Final Countdown LIVE Checklist

Confirm These Program Areas Are Ready For LIVE Operation

✍ Shop Data (Company Info)	✍ Notes
✍ Your Customers and Vehicles	✍ Category List
✍ Tax Rate	✍ Part Codes
✍ Discount Table	✍ Additional Symptoms (if any)
✍ Income/Cash Accts (payment types)	✍ Location & Status Descriptions
✍ Labor Rate	✍ Discount Coupons
✍ All Technicians	✍ Packages
✍ Your Vendors	✍ Tire Package Adjustments (if any)
✍ Inventory (or Parts List) Parts	✍ LOF Package Adjustments (if any)
✍ Shop Supplies & HazMat	✍ Brake Package Adjustments (if any)
✍ Part Kits	✍ End of Day Reports
✍ Canned Jobs	✍ Validations
✍ Markup Matrix	✍ Disclaimers
✍ Markup (Sublet, Parts & Labor)	✍ Reports & Printers
✍ Screen View	✍ Program Security

Confirm These Final Steps Have Also Been Completed

✍ General Ledger Codes Have Been Considered, Changed or Left As Is	✍ Any Compound or Excise Taxes Have Been Calculated and Entered
✍ Checked out all Program Default Settings with Shop Detail Report	✍ Entered two days of Invoices to Confirm program values and any changes to your business processes

Note:

Be sure you're using the **live** program for all of these exercises. If it says Demo at the bottom of your screen, exit demo and click on Program icon.

GO: Set Starting Invoice

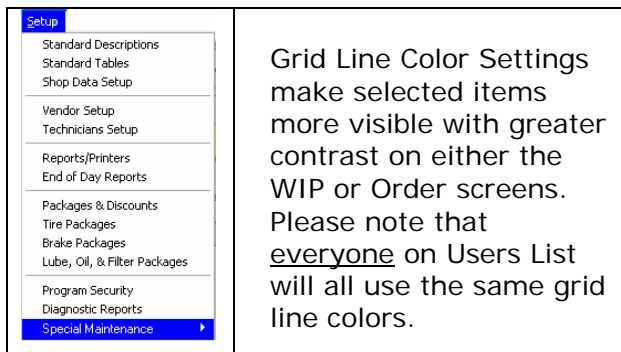
Before you start, you must go to Special Maintenance to set your starting invoice number. While there, you may also consider changing grid line colors to provide more contrast on WIP or Order screens.

Special Maintenance – Set Starting Invoice displays dialog box for entry. Once you've entered this number, future Invoices advance sequentially from that number upward. For example, if you want to begin with Invoice #100, you'd enter starting invoice number 99 here to start.

Once you set a starting invoice number in your live program, you can't go back and enter a lower number.

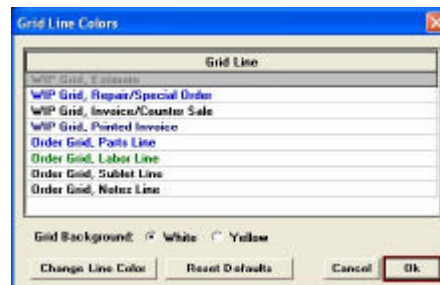
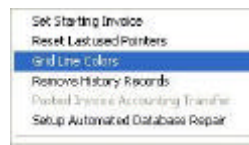
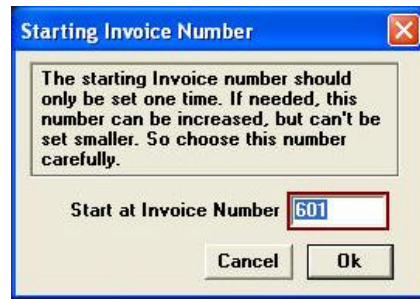
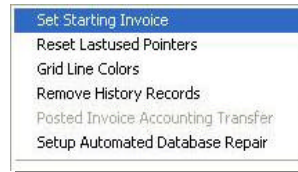
Generally, this is only performed once, before going live. We highly recommend doing this last.

OPTIONAL: Special Maintenance – Grid Line Colors for changing line colors.



NOTE: This menu is activated from program's main color splash screen **ONLY**

You are now ready to go live with ShopKey Management / Service Writer!



Congratulations!

If you've successfully completed the following:

- ? Teach Yourself Management System (book 2 DEMO)
- ? Putting Management System to Work book (book 3 LIVE)

You're now ready to start using your ShopKey Service Writer / Management System program. Your business will be far more efficient, profitable and daily work life just got better for everyone.

Thank you once again for your ShopKey purchase.

