

ALLDATA®

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Manage Online

Shop Management Software

Activity Workbook

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Table of Contents

Introduction	3
Using This Activity Book	3
What do you know?	4
Pre-Requisite viewing.....	4
Login to Manage Online.....	5
Customization and Setup of Manage Online.....	5
The ‘Setup’ Menu:	5
Before you start.....	6
Codes	7
Adding Technicians	8
Adding Service Writers	8
Adding Payment Terms.....	9
Creating Advisory Notes	9
Creating Work Descriptions.....	10
Creating Symptoms	10
Adding Media Codes.....	11
Adding Hazmat Charges.....	11
Adding Deferred Job Reason Codes.....	12
Review - Codes	12
Customization - User Options.....	14
Section A: Manage Online Document Behavior.....	15
Section B: Document Numbers/Prefixes, default Line Codes, Start Menu Options and default Labor Rate.....	15
Creating text for ‘Emailing’	16
Printing	16
Document Footer	17
Reminder Types	18
Pricing	19
Setting the Price Matrix	20
What is the difference between Markup% and Profit Margin%.....	20
Catalog / E-Business.....	22
Vendor Listing.....	22
Customization – Vendors, Parts, Tires & Custom Jobs.....	23
Adding Vendors.....	23

Vendor Contact Information	23
Adding Parts	24
Create a “Custom Job”	25
Build a Second Custom Job	26
Adding Customers and Vehicles	27
Creating a New Customer	28
Entering a Customer’s Vehicle	30
Using the VIN Decoder	31
Manage Online Repair Shop Work Flow	34
Activity 1 – Writing a Ticket	35
Manage Online – Work Area Overview	35
Top Menu Bar	35
Add Job bar/Mileage Confirmation	36
Right Column Options	36
Document Command Bar	37
Document Command Bar, continued	38
Left Column – Customer Tab	39
Left Column – Vehicle Tab	40
Add Job Link	41
Using the Program	42
Exercise 1. Oil Change	42
Adding a Job	43
Adding a part from the Parts list:	46
Using the Quick Parts Feature	46
Using the ‘Quick Parts’ list	46
Using the Catalog	48
Editing a line item on a job:	50
Creating an Estimate/Quote	51
Creating a Repair Order	52
Repair Order Print Options	53
Ordering Parts	53
Receiving Ordered Parts	55
Completing the Work Order	55
Closing the Work Order	56
The Printed Invoice:	59
Glossary for Manage Online	64

Introduction

Manage Online is a shop management system. This means that a repair shop using this software can be more efficient, make more money by protecting profits, and enhance revenue by being more efficient with time and shop resources.

There is no installation required; the program is browser based and can be accessed from anywhere that has internet access. Manage Online automatically backs up shop information each night, protecting them from catastrophic computer crashes, fire or anything that could impact their business.

Some of the key features of Manage Online include a comprehensive customer database, online parts catalogs links, a separate tire inventory section, ability to create custom 'canned' jobs, excellent customer communications features and a solid Customer Resource Management component.

Best of all, Manage Online is fully customizable to each individual shop owners specific shop needs.

Using This Activity Book

This activity book is designed to provide you with an understanding of the importance of the customization process of Manage Online. It is important to know what some of the important features and operations of these are since your customers will be going through the process, but for you, it is of greater benefit to know how the programs works.

You will also have an opportunity to practice using selected activities based on what a typical repair shop may encounter in the course of a week. This knowledge will allow you to effectively discuss the features and benefits which in turn, will help you in selling Manage Online to your customers. If you would like additional instruction on the customization process, please contact the Training Department.



Review and Documentation

During the activity portion of this workbook, you will be asked to send various documents you create in Manage Online. Look for this symbol to the left throughout this activity book. When you see it, it will call out a specific activity for you to complete and send to your personal trainer.

What do you know?

As you begin reading this activity book there are some questions for you to find answers to:

1. Can you explain the difference between Codes and User Options in Manage Online?
2. Which codes would a repair shop need to enter information into in order to effectively utilize Manage Online?
3. Can you describe media codes, and explain what value do they bring to a repair shop?
4. Can you explain the value point for using the hazard disposal code?

Pre-Requisite viewing

Before starting the workbook, please watch the Training Garage videos listed below. This will provide you better context for the activities you will be following in this workbook. It will also enhance your understanding of Manage Online.

Your personal trainer will discuss with you any questions or observations you may have on these Manage Online videos.



Training Garage courses for Manage Online

Training Garage Manage Online Video Viewing Checklist:

- Manage Online Setup Part 1
- Manage Online Setup Part 2
- Manage Online Adding Parts to the Inventory List
- Manage Online Customer Communication Features
- Manage Online Customer Communication Part II
- Manage Online Customer Communication Part III
- Manage Online Adding Customers to a Work Order
- Writing a Work Order using the Jobs Feature Part 1
- Writing a Work Order using the Jobs Feature Part 2

Additionally, there are several videos on the ALLDATA YouTube page you should view.

Login to Manage Online

To Login to Manage Online:

1. Open: Google Chrome (The program works best in this browser)
2. Go to: manageonline.alldata.com (no 'http' or 'www')
3. Click: Login
4. Enter: your username and password

If you are unable to login or are experiencing difficulties, please use this link to contact the Manage Support Team: <http://support.alldata.com/support-requests>

Customization and Setup of Manage Online

The 'Setup' Menu:

What it is, what it does and why it is important.

This is the area where a shop will verify, edit or enter specific information for their shop including **Vendors, Parts, Tire inventory, Technicians, Service Writers, Labor rates, and Custom Jobs.**

Note: It is recommended that you review Setup Part 1 and Part 2 in the Training Garage for a more complete understanding of how to verify, create or edit information and settings in this area.

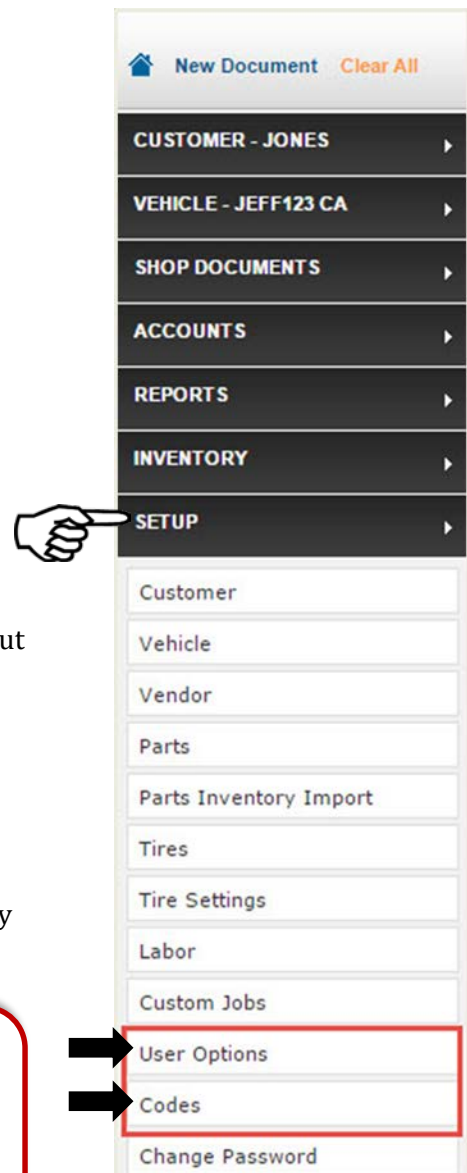
Two of the most important sections of Setup are 'User Options' and 'Codes'.

User Options allows the shop to customize the appearance and functionality of the program. Most of the information is 'optional', but it should be reviewed to ensure it meets the specific needs of the business.

Codes contains information that is **required** for proper function of many of the areas in the program, including taxes, account types, and payment terms and methods. This is also where the shop will enter their Technicians and Service Writers, and where they can create lists of common Symptoms, Work Descriptions, and Advisory Notes.

VALUE POINT!

On average a shop will spend 60-90 minutes customizing, or setting up their shop management software. This is time well spent! Once this is complete they will have a Shop Management System tailored to meet their shop's needs.



Before you start

While the shop's Company Information is entered when the new Manage Online account is created, it is important to review this section to ensure everything is accurate.

To view the Company Information:

1. Click: Setup
2. In this drop down list, click on 'User Options'
3. In the 'Options Home' list click on 'Company Info'

The business name cannot be edited by the user. If an error is present, contact ALLDATA immediately. All other information on this page can be edited. It should also be noted that the zip code will determine the tax rates of the repair shop *and should not be changed unless incorrect*.

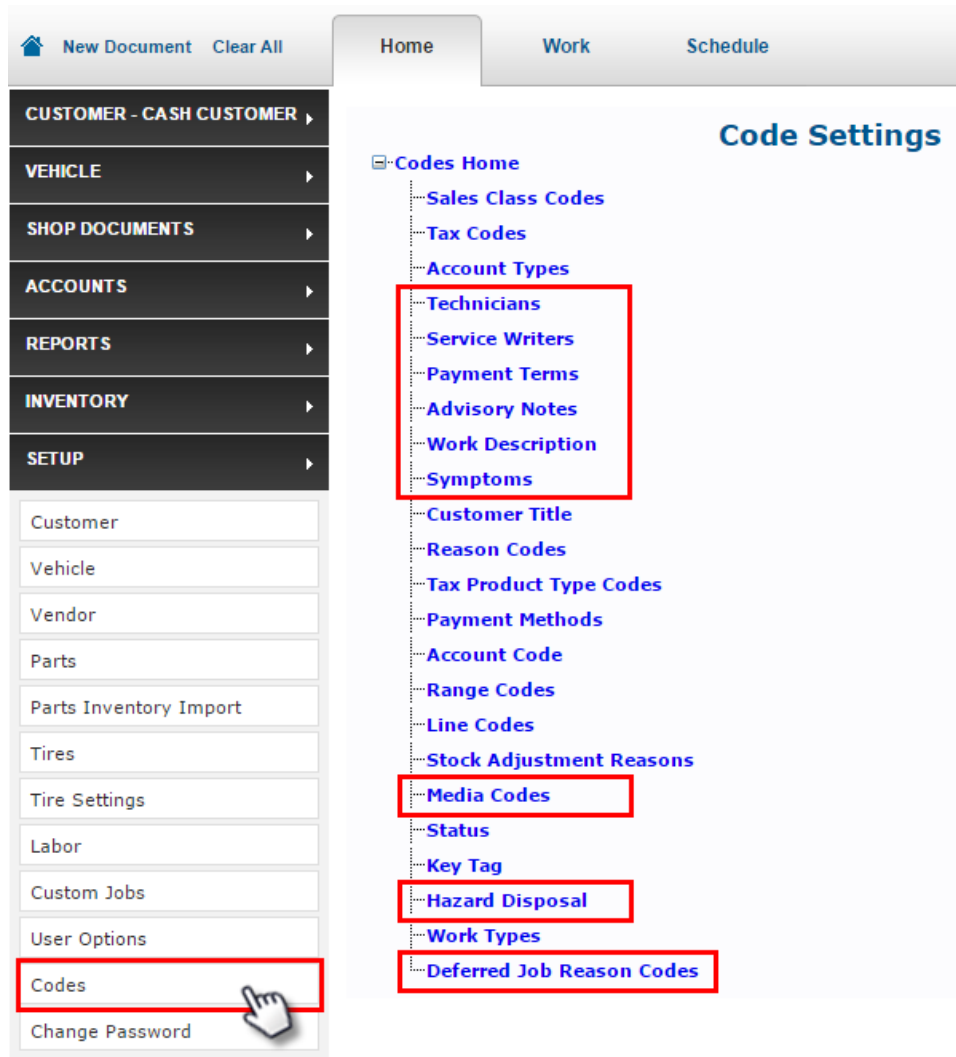
Once a shop has verified the Company Information, they would enter necessary information in setup and optional information in User Option.

Your version of Manage Online was pre-loaded with a working database with most of the essential information you will need to use and demonstrate to customers for the purpose of selling Manage Online; a customer **will need to enter their specific information** based on the needs of their business.

Codes

As explained previously, **Codes** contains information that is required for proper function of many of the areas in the program. If a shop owner does not enter the information for the shop, the program may not perform as expected.

To access Codes, the user would click on the Codes tab under Setup. Each category under this code setting could be completed by a shop using Manage Online. The Training Garage videos Manage Online Setup Part 1 and 2 focus on those highlighted below.



A shop owner would have to add this information in order to start using the program correctly. Your database is different in that it has some information already added. In order to give you an idea of setup and customizing we're going to add a Technician and Service Writer.

Adding Technicians

This is where a shop enters Technician(s) information.

Code	Name	Certification Number	Inspection/Tester
001	Joe Wrench	WA840596	<input type="checkbox"/>

Update Cancel Delete

To add a Technician, open the Codes menu list as shown above, then select “Technicians”.

Click in the box under the **Code** field. Enter a three digit code. This can be *any* combination of letters or numbers (JOE, J01, JR1, 01J, ABC, 123) **For this example enter “002”**

Click the **Name** field to enter their first and last name. You may use any name you would like.

Certification Number field is used if the technician has any specialized certification, such as a ‘smog’ certification. You already have a Technician with a Certification number.

Inspection/Tester is used with the Inspection Schedule feature. A technician must be identified as an Inspector in order to assign him or her to an Inspection Job.

Click on **Update** and then click **OK**.

Adding Service Writers

Service Writers are entered in much the same way. Note that there are no “Certification” or “Inspection/Tester” options.

Click in the Code field and enter a unique code of 3 letters or numbers or a combination of them. Since you already have one Service Writer, enter ‘SW2’ for this one.

Next, click in the Name field to enter the Service Writers name. Enter any name you would like.

Code	Name
SW1	Rachel Ratchet

Update Cancel Delete

VALUE POINT!

Technicians and Service Writers can be easily added to tickets and work orders simply by selecting them from a drop down menu. This maintains a consistency to the repair tickets as well as saves time at the service counter when working with the customer.

Adding Payment Terms

Payment Terms tell a shop when a customer is expected to pay for services. Most shops require payment in full at the time of service; some may have business or fleet customers that pay 'on account' on a monthly basis, or as billed.

The 'Payment Terms' codes are used primarily to indicate payment terms for customers, but can also be created to use with Vendors' information. The example below shows a Payment Term Code for '30 Days Net'; when added to the Vendor Information, this tells the shop when the vendor wishes to be paid.

Your database already contains a Customer payment term of 'TOS' for "Time of Service", which indicates the customer needs to pay in full at the time services are complete.

Payment Terms		
Code	Description	Number of Days
TND	30 Days Net	30
<input type="button" value="Update"/> <input type="button" value="Cancel"/> <input type="button" value="Delete"/>		

NOTE: For a full explanation of Payment Terms and how they work with Payment Methods and Account Types, please refer to 'Manage Online Setup Part 1' in the Training Garage videos.

Creating Advisory Notes

Advisory Notes are used to let the vehicle owner know of a condition that may need attention, or to advise them of safety issues identified by the technician. Advisory Notes for common issues can be created in advance, then added to the work order when needed.

Advisory Notes		
Code	Summary	Description
TIRES	Worn tires	One or more tires worn beyond safe limits

VALUE POINT!

Advisory Notes are added to work orders when the Technician identifies an issue with the vehicle that may need attention soon. Having a list of common issues available saves time at the service counter.

Creating Work Descriptions

'Work Descriptions' can be added to a ticket to let the technician know what should be done to the vehicle. They can also be used by the technician to describe what work was performed.

In either case, the shop can create a list of common Work Descriptions; this saves time when writing a ticket.

Work Description		
Code	Summary	Description
FBRK	Replace front brakes	Replace front brake pads and rotors

Creating Symptoms

'Symptoms' are the comments on an Estimate/Quote that describe why a vehicle is in the shop; they tell the Technician what to look for initially. Manage Online allows the shop to create a list of commonly seen symptoms that can be quickly added to the work order. The Service Writer can also add unique symptoms by simply typing them in and clicking 'Add'.

Symptoms		
Code	Summary	Description
ENGLK	Engine fluid leak	Vehicle leaking fluid from engine area

VALUE POINT!

Creating a list of common Symptoms and frequently used Work Descriptions in the Codes section means the Service Writer can save time at the counter by selecting and adding the information from a list instead of having to write it out each time.

Adding Media Codes

FEATURES:	Media Codes allow a repair shop to track where they are spending their money for advertising campaigns such as radio ads, newspaper spots, etc.
BENEFITS:	Now a repair shop will be able to run a report to see exactly how their spending on media campaigns have impacted their business bottom line.

Media Codes

Code	Desc
REF	Referral

Update
Cancel
Delete

Code	Desc	Edit
REF	Referral	
SCH	Scheduled Maintenance	
WEB	Internet Search	

VALUE POINT!

Creating and using Media Codes along with the CRM feature and Reports allows a shop to track responses from sending maintenance reminder messages, marketing campaigns, customer referral programs and various advertising methods.

Adding Hazmat Charges

If a shop can charge for Hazardous Waste disposal, they can pass along the cost to the customer by creating and using 'Hazmat Charges'. Manage Online allows the shop to create different Hazmat codes for specific types of waste.

Hazard Disposal

Code	EPANumber	Cost	Sell	PTT
USED OIL	1597.08	0.50	1.00	3 - Hazmat ▼

Update
Cancel
Delete

Code	EPANumber	Cost	Sell	PTT	Edit
ANTIFREEZE	1993.65	0.50	1.00	3	
USED OIL	1597.08	0.50	1.00	3	

VALUE POINT!

Many shops may be losing opportunities to capture costs associated with the disposal of hazardous waste. With Manage Online, these costs can be easily captured and tracked, allowing the shop to charge the customer for these charges that once may have fallen to the repair shop to cover.

Adding Deferred Job Reason Codes

A customer may decline recommended services or repairs for many reasons such as lack of money, unable to wait, etc.

By using Deferred Job Reason codes, a shop can capture the reason for declined work to a ticket, and save the job so it may be added to a work order later on.

Deferred Job Reason Codes

Code	Desc
COST	Customer can not afford a

Update
Cancel
Delete

Code	Desc	Edit
COST	Customer can not afford at this time.	
DECL	Customer understands reason for repair but declines now.	
TIME	Customer needs vehicle and can not wait for service.	

VALUE POINT!

Being able to save declined jobs allows a shop to capture work that may have gone to another shop. When used with the CRM message feature, this helps a shop maintain or even increase revenue.

Review - Codes

Two of the most important areas of Setup are Codes and User Options. Why should a shop owner take the time to complete these areas?

What are Media Codes and what features and benefits could you highlight in order to position this to a customer?

How does creating Symptoms and Work Descriptions in the Codes section help with shop efficiency?

Customization - User Options

Set up > User Options focuses on those options in Manage Online which affect the *behavior* and *appearance* of different areas and features of the program. Most of these options can be enabled or disabled by simply checking the option. For others, you can add your own text and or other information. Some of the User Options discussed in this activity book are listed below.

The screenshot displays the 'User Options & Settings' interface. On the left, a navigation pane lists various system areas, with 'User Options' selected and highlighted by a hand icon. The main content area, titled 'Options Home', lists the following settings categories, each enclosed in a red box:

- General
- Emailing
- Printing
- Company Info
- Schedule
- Document Footer
- Reminder Types
- Messages
- Access Control
- Housekeeping
- Pricing
- Default Sales Class Codes
- Inspection Schedule
- Opening Balances
- Shop Supplies
- Invoice History Export
- QuickBooks
- Catalog / E-Business

At the bottom of the page, there are two buttons: 'Update' and 'Cancel'.

Section A: Manage Online Document Behavior

General Options

- Clear document when Estimate created
- Clear document when Work Order created
- Clear document when Invoice created
- Hide Costs
- Average Cost
- Auto Update Inspection due date
- Make Technician required
- Enable QC
- Mark vehicle off site when invoice created
- Always Show All Alternative

Estimate / Quote:

- Estimate
- Quote

‘Clear Document’ options – These options determine ‘behaviors’ when you create a document. If the boxes are checked, the document will close immediately upon creating it, i.e. when you click Estimate, the screen clears. If that happens, you would need to select one of the document Search options to lead it again. **Note: It is recommended that all three boxes are left un-checked.**

Estimate/Quote option determines whether the initial document is called a ‘Quote’ or an ‘Estimate’.

Section B: Document Numbers/Prefixes, default Line Codes, Start Menu Options and default Labor Rate.

Document Start Number

Invoice: 1014
 Credit: 1000
 Estimate: 1016
 R/O: 1025
 Purchase Order: 1011

Document Prefix

Invoice: INV ←

Previous Advice Notes (Months): 14
 Customer Account Prefix: Length 3 ←

Default Line Code: AAA Line Code length is 3. ←

Start Menu:

Vehicle
 Customer ←

Default Labor Rate: LAB1 - Shop Labor ←

Document Search

Days from today: 14
 Automatically display results when search screen is opened

Customer Custom Labels

Custom 1: Account Authorizer
 Custom 2: Custom 2

Document Prefix – You can add a prefix in the field under ‘Document Prefix’. This will apply only to the Invoice state of a work order.

Customer Account Prefix – “Best Practice” is to leave this blank; Manage Online will create a unique code based on the first three or four letters of the customer’s last name.

Default Line Code – Enter ‘AAA’ into this field. Assign the **Line Code length** to: ‘3’

Start Menu – When you open Manage Online, you can have the ‘Vehicle’ tab or the ‘Customer’ tab open first by default.

NOTE: *To make adding new vehicles and customers easier, it is recommended that you select ‘Customer’.*

Default Labor Rate – The ‘Default Rate’ will be used unless you choose another rate at the work order level. If you have only one Labor Rate, that is your default rate.

Remember – after making any changes, you must click ‘Update’!

Creating text for 'Emailing'

1. This is where a shop owner can create messages that are used when they send a copy of a document by email. The message will appear in the email, while the document is sent as a pdf attachment. They can create email text for Quotes/Estimates, ROs, Invoices, as well as several other documents.

Please Note: This is simply to send an attached email. It is **not** for sending a text message.

2. You will see an email in this box. Manage Online automatically provides an email address. Since this is not your own email address, it is important that you replace it with your own email address.

Click into this field and enter your own email address.

Printing

Printing options determine what appears on your document.

IMPORTANT: The “**Include Estimate Disclaimer**” check option will add a disclaimer that meets the specific requirements for the State of Florida. This may meet or exceed requirements for other states. Please check with the Bureau of Automotive Repair, or local governing agency before using this option.

The upper portion of this section affects the layout of the documents

The lower upper portion contains margin settings and print preview options

Printing (continued)

Document Logo Upload – If you wish to upload your shop logo and you want it shown on documents, check the box to use the image in documents.

Image upload Click the ‘Browse’ button and navigate to the photo/image you want to show on your documents.

NOTE: For best results, image should be 230 pixels wide by 160 pixels high. This converts to an image about 2¼ inches by 1½ inches.

Click ‘Image Upload’ – The image will appear under ‘Current Image” (If the image appears cut off or distorted, you will need to resize the original image to 230x160 pixels)

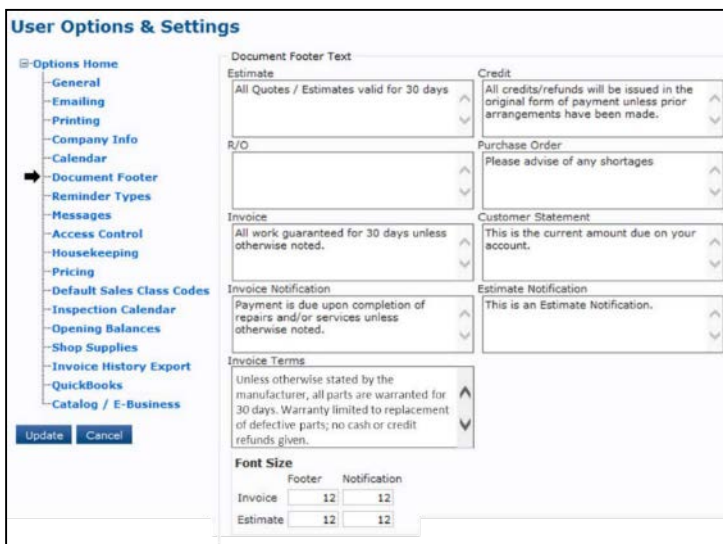
Make sure the boxes under ‘Print Layouts’ are checked.

Margins controls the header and footer margins on the printed pages.

Automatically popup print preview. Click these boxes if you want a print preview to popup (open) when you create the documents listed.

Consolidate lines on document – You can choose to minimize lines on a document and hide part numbers.

Document Footer



Document Footer Text - This page offers a variety of text fields where you can add text to the footers, notifications, and invoice terms.

The upper section is for footers on Estimates, Quotes, Repair Orders, Purchase Orders, and Credits.

The middle section provides notifications which will appear on documents. This text appears only on Invoices, Invoice Notifications, Customer Statements and Estimate Notifications.

The lower section, Invoice Terms will be text that appears below a footer and is typically smaller text size. You could think of this as the ‘fine print’.

You may use the examples listed in the example to fill in the footers within the text boxes on your screen.

Font Size will cause the text size to change depending on what it is set to from this section.

Reminder Types

User Options & Settings

Options Home

- General
- Emailing
- Printing
- Company Info
- Calendar
- Document Footer
- Reminder Types**
- Messages
- Access Control
- Housekeeping
- Pricing
- Default Sales Class Codes
- Inspection Calendar
- Opening Balances
- Shop Supplies
- Invoice History Export
- QuickBooks
- Catalog / E-Business

Reminder Types

Current Reminder
Create a new reminder ▼

Reminder Name Auto Update due date

Update Cancel

VALUE POINT!

Creating and using Reminder Types can help a shop increase business and revenue, as well as enhancing customer relationships and loyalty.

Click on the down arrow within the 'Current Reminder' box to display a list of reminders that can be added to a work order.

A shop might have as many reminders as they need, such as, 'Inspection', 'Service', or 'Oil Change'. On the actual work order in Manage Online, these reminders will be listed on the lower right corner of the screen.

Reminders can also be used with the Customer Relations Management (CRM) portion of the program to send text or email messages reminding them that service or maintenance is due soon.

Pricing

Read the explanation of 'pricing' before you set your pricing options.

Enable markup pricing
 Apply Markups to My Prices as well
 Apply Markups to Quick Parts / Fluids
Default Markup

Checking 'Enable Markup Pricing', generates a sell price based on your markup and cost for parts purchased from online catalogs.

Check 'Apply Markups to My Prices as well' – uses the same markup as for online catalogs, and applies it to parts in your inventory. This will override individual sell prices for parts.

'Default Markup' - sets a standard markup percentage for every part sold when there is no Price Matrix available.

Markup Matrix				
Select Vendor	From Value	To Value		Markup
-All-			<input checked="" type="radio"/> \$ <input type="radio"/> %	<input type="text"/> <input type="button" value="Add"/>
AUTOZONE	0.00	1.00	%	75.00 <input type="button" value="X"/> <input type="button" value="Pencil"/>
AUTOZONE	1.01	5.00	%	69.00 <input type="button" value="X"/> <input type="button" value="Pencil"/>
AUTOZONE	5.01	50.00	%	55.00 <input type="button" value="X"/> <input type="button" value="Pencil"/>
AUTOZONE	50.01	100.00	%	50.00 <input type="button" value="X"/> <input type="button" value="Pencil"/>
Bob's Parts	0.00	1.00	%	71.40 <input type="button" value="X"/> <input type="button" value="Pencil"/>
Bob's Parts	1.01	5.00	%	69.00 <input type="button" value="X"/> <input type="button" value="Pencil"/>
Bob's Parts	5.01	50.00	%	55.00 <input type="button" value="X"/> <input type="button" value="Pencil"/>
CRAZY CARL DISCOUNT PARTS	0.00	1.00	%	500.00 <input type="button" value="X"/> <input type="button" value="Pencil"/>
CRAZY CARL DISCOUNT PARTS	1.01	5.00	%	100.00 <input type="button" value="X"/> <input type="button" value="Pencil"/>
USA AUTOMOTIVE SUPPLIES	0.01	10.00	%	55.00 <input type="button" value="X"/> <input type="button" value="Pencil"/>
USA AUTOMOTIVE SUPPLIES	10.01	50.00	%	45.00 <input type="button" value="X"/> <input type="button" value="Pencil"/>

Set minimum alerts below
 "Check Margins" alert will be displayed when total margin falls below minimum

Parts Margin

Labor Margin

Total Margin

Enforce Minimum Margin Password Check
 If enabled the user will be required to enter the password when the total margin falls below the set minimum margin in order to continue with an invoice.

Password

Update prices on order defaults:
 Update document / database cost on order / receive for existing parts-

Cost

Sell

The price matrix is vendor based. This means that a shop can select specific vendors and add their own markups as needed.

FEATURES	ADVANTAGES	BENEFITS
The 'Margins' feature allows shops to enter their <i>target</i> numbers for gross margins of profit on parts, labor and total margins. It is not a pricing tool, but rather an analysis feature that compares cost to selling on parts and labor.	Shops can specifically target margins they want to meet.	Service Writers can check to see if a job meets parts and/or labor profit margins before they quote the job to the customer.
Margins will allow a shop to set across the board markups or select a detailed price matrix.	Shops can choose to set a price matrix for specific vendors they order parts from. This will allow them to set very detailed margins for each price point.	Remains a simple default markup for the shop, or can get as detailed as the shop would like.
Protect margins by protection by a password.	Protect the shops bottom line by not allowing a lower margin unless specifically allowed.	Keeps the shop profitable, but for certain situations can be overridden, but requires a password.

Setting the Price Matrix

Remember any value beyond the highest value in the table will be marked up to the 'Default Markup' if you have entered that figure. If not, you will need to calculate and apply a markup using the 'Quick Edit' feature in the work area.

What is the difference between Markup% and Profit Margin%

Some people confuse 'markup' with 'margin', and this misconception can lead to lower gross profits than anticipated. Though both are part of a pricing strategy, markups and margins are not the same.

Markup is a percentage of the cost, as in a 50% markup, which is then added to the cost to get the selling price.

Margin is the gross profit – the actual dollars you make when you sell a part or service; it is what is 'left over' after you subtract the cost of the part or service from the selling price.



Let's look at two examples to illustrate the difference:

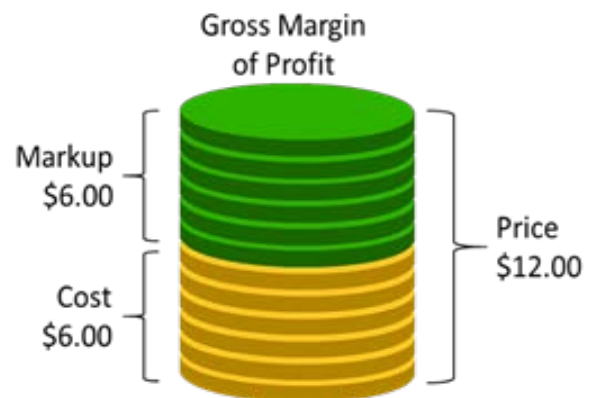
Example #1

Say you have a part that costs \$1.00, and then decide to add a 50% markup.

This means that you added 50% of the cost which is of \$1.50

.50 cents to get a selling price

Even though the markup is 50%, the gross margin of profit on the part is only 33%, Because .50¢ is 1/3 of the selling price of \$1.50



Example #2

Now take your \$6.00 part and add a markup of 100%

This time the 100% is added to the cost which was \$6.00 to get a selling price of \$12.00

With a markup of 100%, the gross margin of profit on this part is 50%, because \$6.00 is 1/2 of the selling price of \$12.00

Shop Supplies

FEATURE:	“Shop Supplies” enables a shop to create a surcharge for items used to support repair and maintenance such as parts cleaner, shop towels and other miscellaneous items.
BENEFIT:	Shop Supplies can now be added to a work order to capture costs incurred for items which in the past may have been overlooked and not charged for.

Check the box to have Shop Supply charges added to a work order automatically. You can edit or remove the charges at the work order level.

Shop Supplies

Apply Shop Supplies Fee

Type

Percent

Amount

Sales Class

Code

Description

Product Tax Type

You can choose to apply them as a percentage of the total charges, or as a percentage of parts and labor.

If you want a ‘**Fixed Price**’ for your shop supplies, you can select this from the ‘**Type**’ drop down list.

The **Sales Class** and **Product Tax Type** are also drop down lists.

The rest of the fields on this screen have been pre-filled and you may change them if you wish.

If you created a Product Tax Type specifically for Shop Supplies, you can select it from the drop down list; otherwise select either ‘Parts’ or ‘Labor’ as appropriate.

VALUE POINT!

Shop Supplies charges enable a shop to capture costs associated with repairs but not normally billed such as the cost of parts cleaner, shop rags, courtesy floor mats and so on. This helps protect their bottom line.

Catalog / E-Business

This is where you enter your online parts catalog credentials.

! Note: You must create your new Vendor *before* you ‘associate’ them with an on-line catalog. This is covered in the next Section. SEE page 22

As other parts catalogs come online, you will follow these same steps for each catalog using the appropriate information as supplied by the vendor using that catalog. Note that ALLDATA does NOT provide the credentials.

For additional information, refer to the ‘Online Parts Catalog Setup’ article at:

<http://support.alldata.com/manage-online-article/setting-vendor-accounts-online-parts-catalogs>

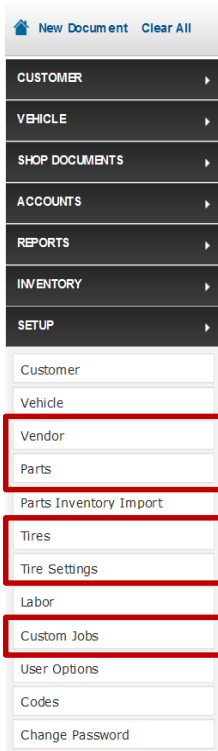
Vendor Listing

Below is a list of vendors, Usernames as well as Passwords for your own personal use.

NOTE: This listing is ONLY for your own purposes. A customer would need their own Username and Password. DO NOT GIVE THESE OUT.

Vendor: DST (Distribution Service Technologies) Catalog: TurboParts Username: FMSSMS Password: smstest	Vendor: Full Service Auto Catalog: IAP Username: alldatafull Password: alldata StoreID: loc07 BrokerID: 726182 SMSBrokerID: 308710 Program Group: estore Partner Company: fullservice	Vendor: IMC Catalog: IMC Username: 2512alldata Password: abcd1234 StoreID: 10651 Account No: 0001000366	Vendor: Parts Is Parts Catalog: AutoCat Username: SNOACK Password: UPQCEM
Vendor: Intermountain Electric Catalog: WHI Username: alldata Password: testing	Vendor: Federated Auto Parts Catalog: Autoi Username: Password: At the time of printing there was no username or password available.		

Customization – Vendors, Parts, Tires & Custom Jobs



Of these areas, Vendors and Parts are the most important. A shop may not sell Tires, and may not want to use Custom Jobs, but if they are going to maintain a parts list (inventory) and order parts from vendors, whether using an Online Catalog or other means, they will need to set these items up before they can use them.

Vendors and Parts must be entered in order to add parts to a work order or to order them from a vendor.

While Tires and Tire Settings, and Custom Jobs are optional features, they are both beneficial to a shop.

Adding Vendors

Before you can add parts to your parts list or enable any of the online parts catalogs, you must add the vendors that will be associated with them.

Vendor ID – You can either create a unique Vendor ID or you can **leave this field blank** and let Manage Online auto generate a Vendor ID Based on the first three letters of the vendor’s name.

Vendor Contact Information

There are two sections for names, phone/fax numbers and emails. The top section should contain contact information a shop would use to order parts. The lower section can contain contact information they would use if there are different contacts for their account billing from this vendor.

! Note: When you have setup your Vendors, you must then go back to Catalog/e-Business to enter the credentials for each. See page 21

Adding Parts

The Parts section allows you to select and identify specific parts and fluids that a repair shop keeps on-site in their own shop inventory, or that they may order frequently.

1. The Line Code is required; a customer can either create their own or use the 'default' line code of "AAA".
2. A Vendor Code is required before a part can be saved.
3. The Selling Price can be left blank IF the shop has created a price matrix for this cost range. If the matrix has been set up and a selling price is entered, it will override the markup.
4. See what the markup price of an item will be when it is added to the parts inventory. The benefit of this is to immediately see what the customer will pay for a part based on the cost set by the shop.

5. Check 'Quick Part' or 'Fluid' to add this part to the Quick Parts list, and 'Stocked Part' if this is in the shop's inventory on hand.

6. "Free Stock" is the number of this item on the shelf when this part was added to Manage Online.

7. "Min Stock" and "Max Stock" are used with the Suggested Order feature.

Value Point!

Now a shop can see at-a-glance what the selling price will be for parts they keep in their inventory.

For more detailed information on this topic, see the 'Adding Parts to the Inventory List' module on the Training Garage.

Create a “Custom Job”

Purpose of these Activities: To walk through the steps for creating “Custom Jobs” such as “Mechanical Diagnosis”. Once a repair shop has created Custom Jobs based on work they see frequently, a Service Writer can easily select these to add to a ticket. Not only is the job now listed on the ticket, but the R/O is also populated with the parts that will be needed for the job along with prices and labor times.

The screenshot shows the 'Custom Jobs Maintenance' interface. On the left is a sidebar with navigation options: CUSTOMER - SMITH, VEHICLE, SHOP DOCUMENTS, ACCOUNTS, REPORTS, INVENTORY, and SETUP. The main area has a title 'Custom Jobs Maintenance' and a form with the following fields: Job Name (Mech Diag), Description (Diagnose Mechanical Issues), and Sales Class Code (4001 - Labor Sales). There are 'Update' and 'Cancel' buttons. Below the form is a table of existing jobs:

Job Name	Description	Delete	Edit
Mech Diag	Diagnose Mechanical Issues	X	✎
PWRSTRPMP	Power Steering Pump	X	✎
Winterize	Winterize Special	X	✎

At the bottom, there is a table for adding items to the job:

Type	Code	Description	Sub Group	Sales Class	Qty	Sell	Total	Delete	Edit
L - Labor	LAB1	Shop Labor		4001	1.00	45.00		X	✎

A 'Work Order Total' of 45.00 is displayed at the bottom left.

Click on Custom Jobs:

1. Type: *Mech Diag* in the **Job Name Find** field.
2. In the **Description** field, type: *Diagnose Mechanical Issues*.
3. In the menu for **Sales Class Code**: Select **4001 - Default Sales** from the drop down list.
4. The **Type** field is a drop down list that remains defaulted to *P-Product*. Click on the drop down arrow and select: **L-Labor**
5. In the **Code** field enter: *LAB1* (This is a labor code you created earlier) and click 'Find'
6. Enter: **1** to **Qty** and click 'Add'
7. Click **Update**

Build a Second Custom Job

- 1) In the **Job Name** field type: *Winterize*
- 2) In the **Description** field, type: *Winterize Special*
- 3) In the menu of **Sales Class Code**: Select **4000 - Default Sales** from the drop down list.
- 4) In the **Type** field drop down list: Select: **P - Product**
- 5) In the **Code** field enter: **AAA**
- 6) Click: **Search** (NOTE the screen change.)

Custom Jobs Maintenance

Job Name *Find* 1 Description 2 Sales Class Code 3
 Winterize Winterize Special 4000 - Default Sales Update Cancel

Fixed Price Cost Sell Use Customer Default Labor Rate

Job Name	Description	Delete	Edit
Mech Diag	Diagnose Mechanical Issues	✗	✎
PWRSTRPMP	Power Steering Pump	✗	✎
Winterize	Winterize Special	✗	✎

Type 4 Code 5 Description Qty Sell 6
 P - Product AAA Search Add Clear

- 7) Click on the green check mark next to *Antifreeze, Peak*

Product	Description	Group	Cost	Sell	PTT	Select
AAA10335498	Alternator	Misc	179.48	314.09	Parts	✓
AAA5833MP	Oil	Misc	3.47	6.07	Parts	✓
AAA601458	DOT3 Brake Fluid	Misc	3.78	6.62	Parts	✓
AAAPR30BLW1G	Deicer/Washer	Misc	7.24	12.67	Parts	✓
AAAPRA003	Antifreeze, Peak	Misc	7.26	12.70	Parts	✓ 7
AAAPSF963	Power Steering Fluid	Misc	0.00	0.00	Parts	✓

Custom Jobs Maintenance

Job Name *Find* Description Sales Class Code
 Winterize Winterize Special 4000 - Default Sales Update Cancel 10

Fixed Price Cost Sell Use Customer Default Labor Rate

Job Name	Description	Delete	Edit
Mech Diag	Diagnose Mechanical Issues	✗	✎
PWRSTRPMP	Power Steering Pump	✗	✎
Winterize	Winterize Special	✗	✎

Type 8 Code 9 Description Qty Sell
 P - Product AAA Find Search Add Clear

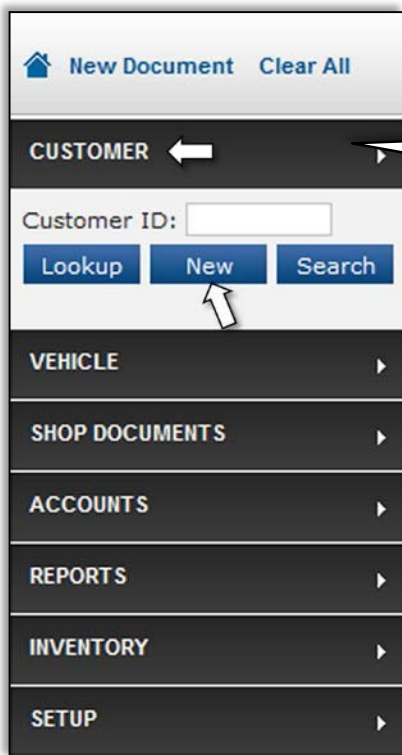
- 8) Enter: **1.5** in **Qty**
- 9) Click on: **Add**
- 10) Click on 'Type' and select a labor rate, "LAB1". Click the green check to select it.
- 11) Enter 'Qty' as 0.5
- 12) Click: **UPDATE** and **OK**

Adding Customers and Vehicles

Up until this point in the activity book, the focus has been on setup-customization. Once that is completed, a shop owner can begin using the software to help manage his repair shop. The focus moving forward will be on the day-to-day use of Manage Online.

Best practice is to add a customer *before* adding their vehicle. When you create the customer first, then the vehicle, the vehicle is automatically associated with the new customer.

If you create the vehicle first, it will associate it with a generic 'cash customer', and you would then need to create the customer, recall the vehicle and 'transfer' it to the new customer from the 'cash customer'.



The 'Customer Tab' will open by default if you selected that option in 'Setup > User Options > General > Start Menu'

Select: **Customer** from the main category list, it may already be open on your screen.

Click: **New** (blue button) the customer page will open.

VALUE POINT!
Adding new Customers first before adding their Vehicle information saves time!

Creating a New Customer

As with previous screens with many entry fields, we will look at the Customer page in sections to make it easier to follow.

- a. **NOTE:** Skip the 'Customer ID' box. (Manage Online will self-generate a customer ID for you.)
- b. Enter: **Title**. For this example: Enter: **Mr**.
- c. Enter: **First Name**. For this example: Enter: **Ted**
- d. Enter: **Last Name**. For this example: Enter: **Sturgeon**
- e. Enter: **Street Address**. For this example: Enter: **5678 Gogee Way** (Don't worry about the City, the next step will complete this)
- f. Enter: **Zip Code**. For this example: Enter: **95757**
- g. Click: **Lookup** (this will populate the city and state fields)
- h. Enter: **Default Labor Rate**. Click the dropdown arrow and select: **LAB1**
- i. In the **Contact By** area, **uncheck** Fax and Letter since Manage Online does not support either.

The screenshot shows the 'Customer' form in the ALLDATA system. The form is divided into several sections:

- Customer ID:** A text input field.
- Title & First Name(s):** A dropdown menu set to 'Mr' and a text input field containing 'Ted'.
- Last Name/Business:** A text input field containing 'Sturgeon'.
- Address:** A text input field containing '5678 Gogee Way'.
- City:** A text input field containing 'ELK GROVE'.
- State:** A dropdown menu set to 'CA' (CALIFORNIA).
- Zip Code:** A text input field containing '95757' and a 'Lookup' button.
- Status:** A dropdown menu set to 'Current'.
- Default Labor Rate:** A dropdown menu.
- Contact By:** Checkboxes for 'Msg.', 'Fax', 'Letter', 'Phone', and 'Email'. 'Msg.', 'Phone', and 'Email' are checked.
- Tax Status:** A dropdown menu set to '2 - Taxable'.
- Contact:** Text input fields for 'Work Phone', 'Home Phone', and 'Cell Phone'. A radio button is selected for 'Cell Phone'.
- Enter your cell #:** A text input field.
- Fax:** A text input field.
- Email:** A text input field with the placeholder 'Enter your email address here'.
- Fleet Code:** A text input field.
- Credit Limit:** A text input field.
- Parts Disc(%):** A text input field.
- Labor Disc(%):** A text input field.
- Payment Terms:** A dropdown menu set to 'TND - 30 Days Net'.
- Selling Level:** A dropdown menu set to 'Retail'.
- Sales Tax Exemption No.:** A text input field.
- Expiry Date:** A date picker.
- Cust Type:** A dropdown menu set to '1 - Individual'.
- Account Authorizer:** A text input field.
- Custom 2:** A text input field.
- Vehicle List:** An empty table area.
- Notes (Double click to edit):** A large text area for notes.
- Buttons:** 'Save', 'Cancel', 'Search', 'Msg.', and 'Fax / Email' are located at the bottom left. 'Add New Note' is located below the notes area.

Callout letters in the image point to the following fields:

- j:** Cell Phone field
- k:** Radio button for Cell Phone
- l:** Email field
- m:** Payment Terms dropdown
- n:** Cust Type dropdown
- o:** Save button

- j. In the **Cell Phone** field for this example: **enter your own cell phone number.**
- k. Click on the **radio button** for cell phone
- l. In the **Email** field, for this example: **enter your own email address.**
- m. Click on the dropdown arrow in the **Payment Terms** field and select, **TOS – Time of Service**
- n. In the **Cust Type** field click the dropdown arrow and select: **1 – Individual**
- o. Click: **Save**

Notes:

Entering a Customer's Vehicle

You can enter a vehicle by selecting the Year, Make, Model and Engine or you can use the VIN Decoder feature to do this for you. **Best Practice** is to use the VIN Decoder. Using the VIN decoder ensures getting the correct information, which in turn enhances the performance of the Online Parts catalogs.

Click on the **Vehicle** tab (Notice that the Customer tab above is still on "STURGEON" to show this will be his vehicle) then click: **New**

- a. In the **License** field enter the vehicle license number: **4TKY345**. The 'State' will default to your location, but you can choose another state or Canadian Province from the drop down list.

To enter a Vehicle manually, select Year, Make, Model, Engine and any other details you need from the drop down lists.

- b. In the **Year** field, click the dropdown arrow and select: **2013**
- c. In the **Make** field, click the dropdown arrow and select: **Honda**
- d. In the **Model** field, click the dropdown arrow and select: **Accord**
- e. In the **Engine** field, click the dropdown arrow and select: **2.4**

FYI: What you have just entered above, Year, Make, Model, Engine is referred to as "YMME"



For this exercise – go back to the Year drop down and click on the 'blank space' at the top of the list. This will clear the information you have just entered, but keep the Customer information.

We are going to use the VIN Decoder feature to add the vehicle.

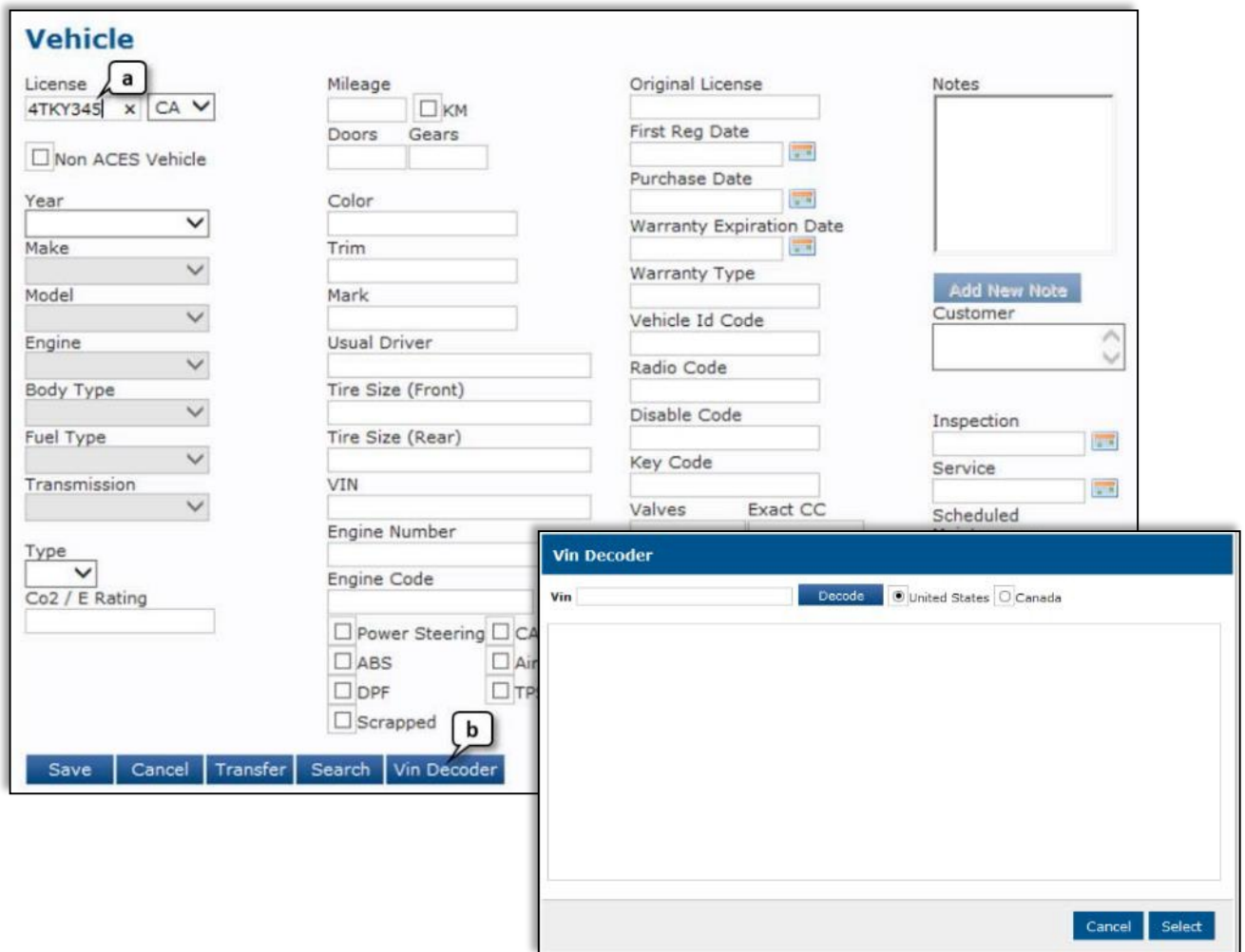
Using the VIN Decoder

To demonstrate the power of the VIN decoder, we will enter the VIN for Ted Sturgeon’s vehicle, and you will see how it speeds the process for entering vehicle information.

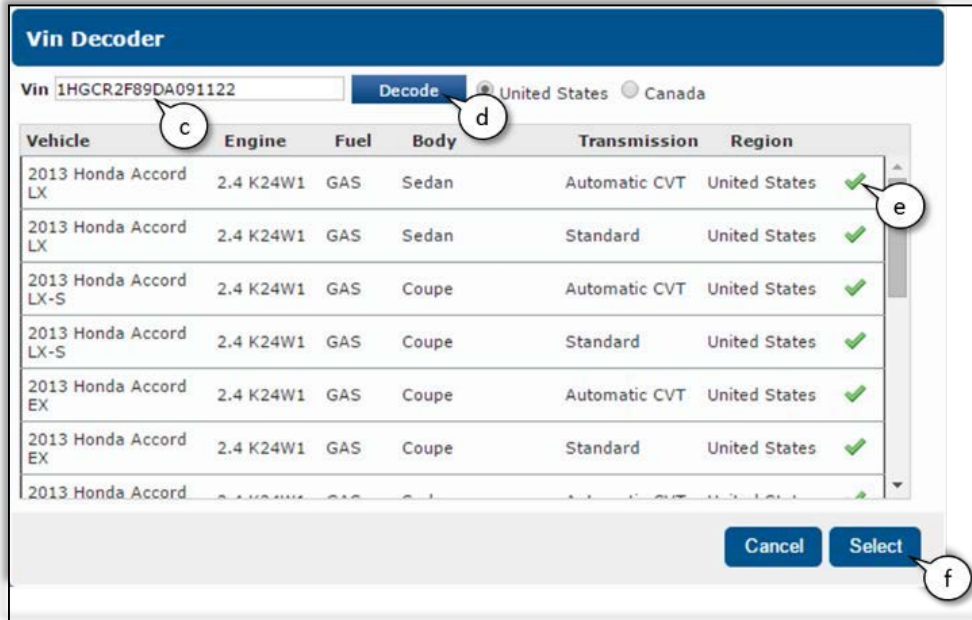
FEATURE:	Manage Online features a VIN Decoder which allows a Service Writer to quickly enter specific vehicle information into the program
BENEFIT:	This saves time and ensures accurate vehicle information, which in turn enhances the Online Catalog function.

Entering a Vehicle using the VIN Decoder:

- a. The vehicle license should still be displayed. If not, add it now.
- b. Click on the **Vin Decoder** button (a new window will open)



- c. Enter **this VIN** in the Vin field: **1HGCR2F89DA091122**
- d. Click: **Decode**



There may be only a few vehicles in the list or many, depending on the 'Options' packages offered by the manufacturer.

We want the first vehicle on the list – the 2013 Honda Accord LX, 2.4 K24W1 GAS Sedan with Automatic CVT transmission

- e. Click the *green checkmark* to the right
- f. Click 'Select' at the bottom of the window.

VALUE POINT!

By using the VIN Decoder in Manage Online, a Service Writer can save themselves additional steps when entering a vehicle, as well as ensuring the Online Catalogs work correctly.

Notes:

Notice in the circled area that all the same information you previously entered manually has now been automatically been filled. This information is from decoding the VIN. You can see that this is a great step-saver, and it ensures that the complete vehicle information is entered.

The screenshot shows the 'Vehicle' form in the ALLDATA system. A red dashed circle highlights the VIN decoder area and the fields it populates. The VIN entered is 1HGCR2F89DA091122. The populated fields include: License (4TKY345, CA), Year (2013), Make (Honda), Model (Accord), Engine (2.4), Body Type (Sedan), Fuel Type (GAS), Transmission (Automatic CVT), Mileage (blank), Doors (blank), Gears (blank), Color (blank), Trim (blank), Mark (blank), Usual Driver (blank), Tire Size (Front) (blank), Tire Size (Rear) (blank), VIN (1HGCR2F89DA091122), Engine Number (blank), Engine Code (blank), Power Steering (checkbox), ABS (checkbox), DPF (checkbox), Scrapped (checkbox), CAT (checkbox), Air Con (checkbox), and TPS (checkbox). Other fields like Original License, First License Date, Purchase Date, Warranty Expiration Date, Warranty Type, Vehicle Id Code, Radio Code, Disable Code, Key Code, Valves, Exact CC, Camshaft, Cylinders, Weight, Fuel Delivery, Notes, Inspection, Service, and Scheduled Maintenance are also visible but not highlighted.

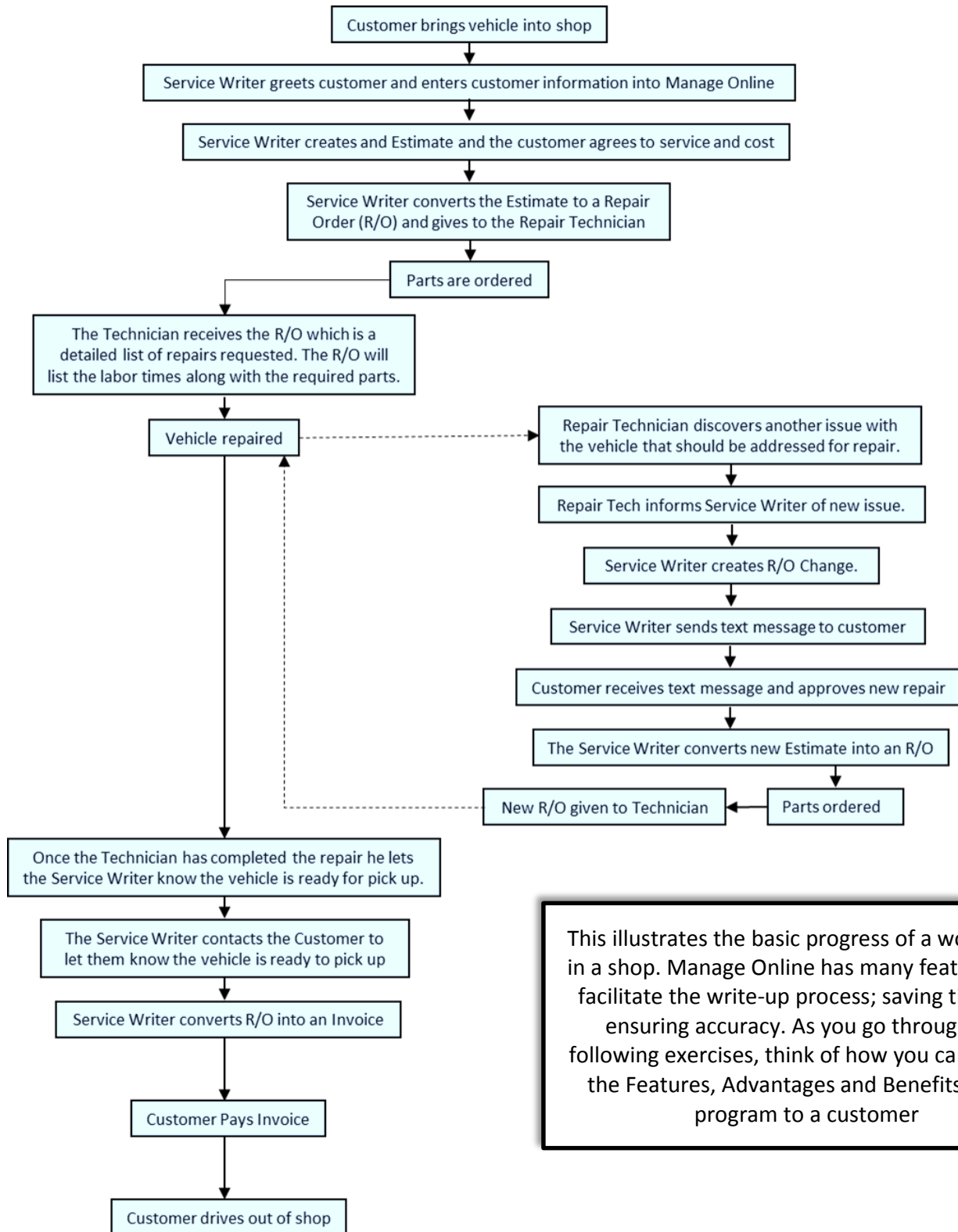
You can enter the vehicle **Mileage**, however if you leave it blank, this will be auto-filled when the mileage is entered on the work order.

You may continue to enter additional information such as, how many doors, color, trim, tire size, whether vehicle has power steering, anti-lock brakes, air conditioning, key codes, etc.

Click: **Save**. (This button may say 'Update' if you previously saved any information)

Notes:

Manage Online Repair Shop Work Flow



This illustrates the basic progress of a work order in a shop. Manage Online has many features that facilitate the write-up process; saving time and ensuring accuracy. As you go through the following exercises, think of how you can explain the Features, Advantages and Benefits of the program to a customer

Activity 1 – Writing a Ticket

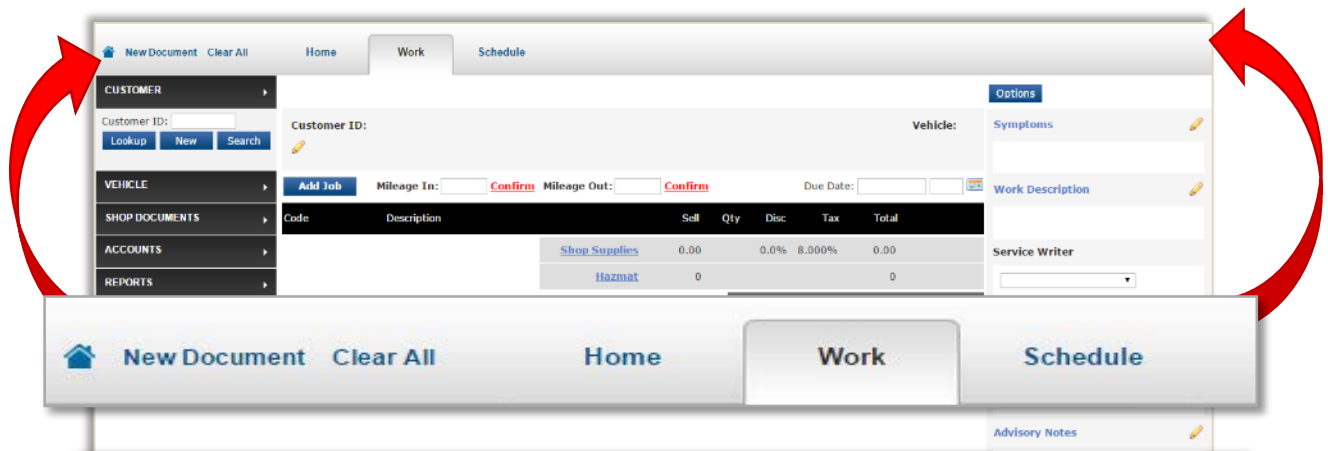
The purpose of these Activities is to take you step-by-step through the process of using Manage Online to write a ticket. These activities are meant to provide you examples of how a repair shop would use Manage Online to enter new customers and vehicles, create ROs, invoice tickets, collect payment, save estimates, etc.

Note: the terms ‘ticket’ and ‘work order’ are used interchangeably throughout the industry; either term refers a document in progress. Quote/Estimate, Repair Order (or RO) and Invoice refer to specific stages of a work order or ticket.

Manage Online – Work Area Overview

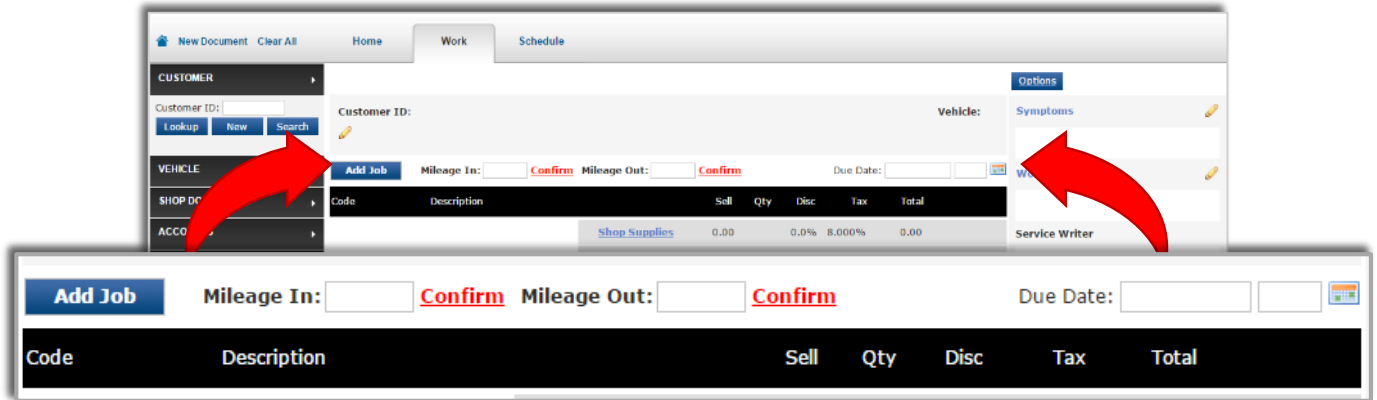
It is important to be familiar with the basic layout of the Manage Online Work; before you start writing a work order, take a few minutes to become familiar with the Work Area:

Top Menu Bar



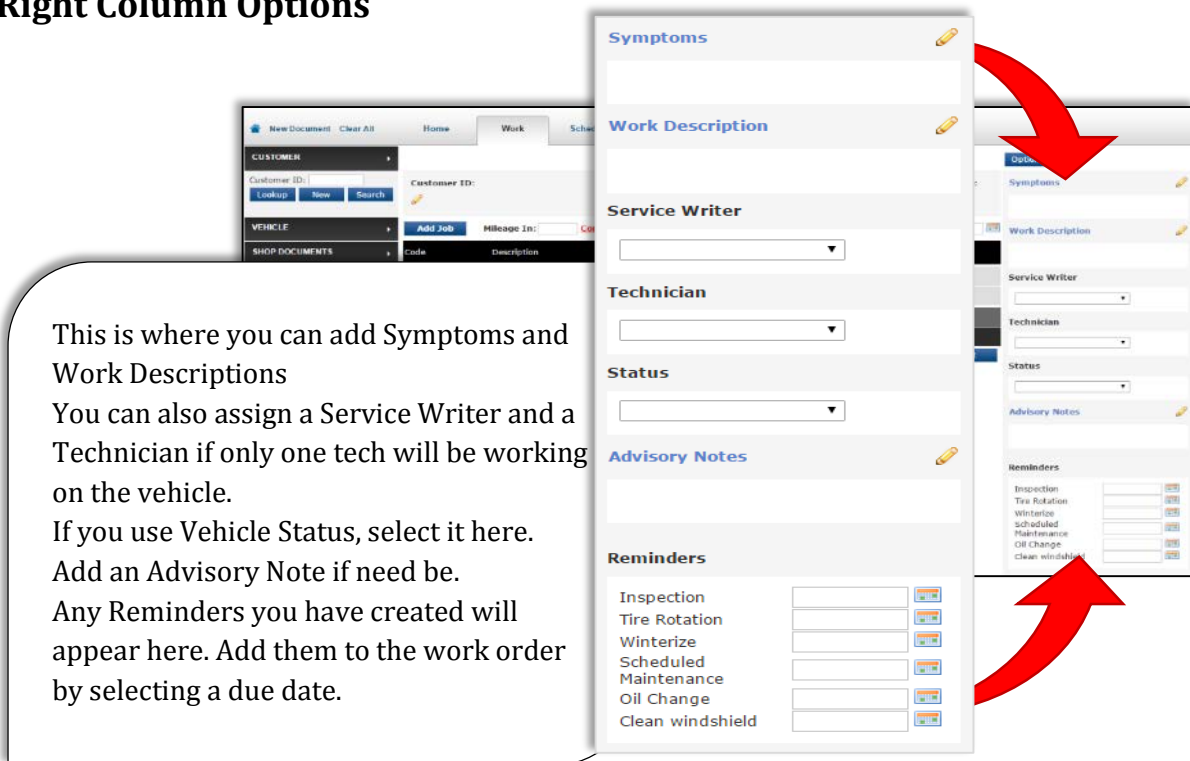
- This icon and the ‘Work’ tab return you to the Work Area
- “New Document” will start a new work order for the current customer.
- “Clear All” resets the work area; you will be prompted to save any current document.
- “Home” returns you to the Home Page.
- “Schedule” opens the Shop Work Hours scheduler.

Add Job bar/Mileage Confirmation



“Add Job” starts a new Job Group
 Use “Mileage In” and “Mileage Out” to enter and confirm mileage
 “Due Date” allows you to enter an optional date for completion of service.

Right Column Options



This is where you can add Symptoms and Work Descriptions
 You can also assign a Service Writer and a Technician if only one tech will be working on the vehicle.
 If you use Vehicle Status, select it here.
 Add an Advisory Note if need be.
 Any Reminders you have created will appear here. Add them to the work order by selecting a due date.

Document Command Bar

The screenshot displays the ALLDATA software interface. At the top, there are navigation tabs: Home, Work, and Schedule. Below this is a sidebar with menu items: CUSTOMER, VEHICLE, SHOP DOCUMENTS, ACCOUNTS, REPORTS, INVENTORY, and SETUP. The main area shows a work order form with fields for Customer ID, Mileage In, Mileage Out, and Due Date. A table lists items with columns for Code, Description, Sell, Qty, Disc, Tax, and Total. Below the table is a summary section with columns for Goods, Tax, and Total. At the bottom, the Document Command Bar is visible, featuring five tabs: Estimate, Create R/O, Assign R/O, Invoice, and Credit. Red arrows point from these tabs to a callout box.

The first five tabs on the Document Command bar are:

“Estimate”. Click here to move an initial work order to an Estimate or Quote (depending on which option was selected in Setup)

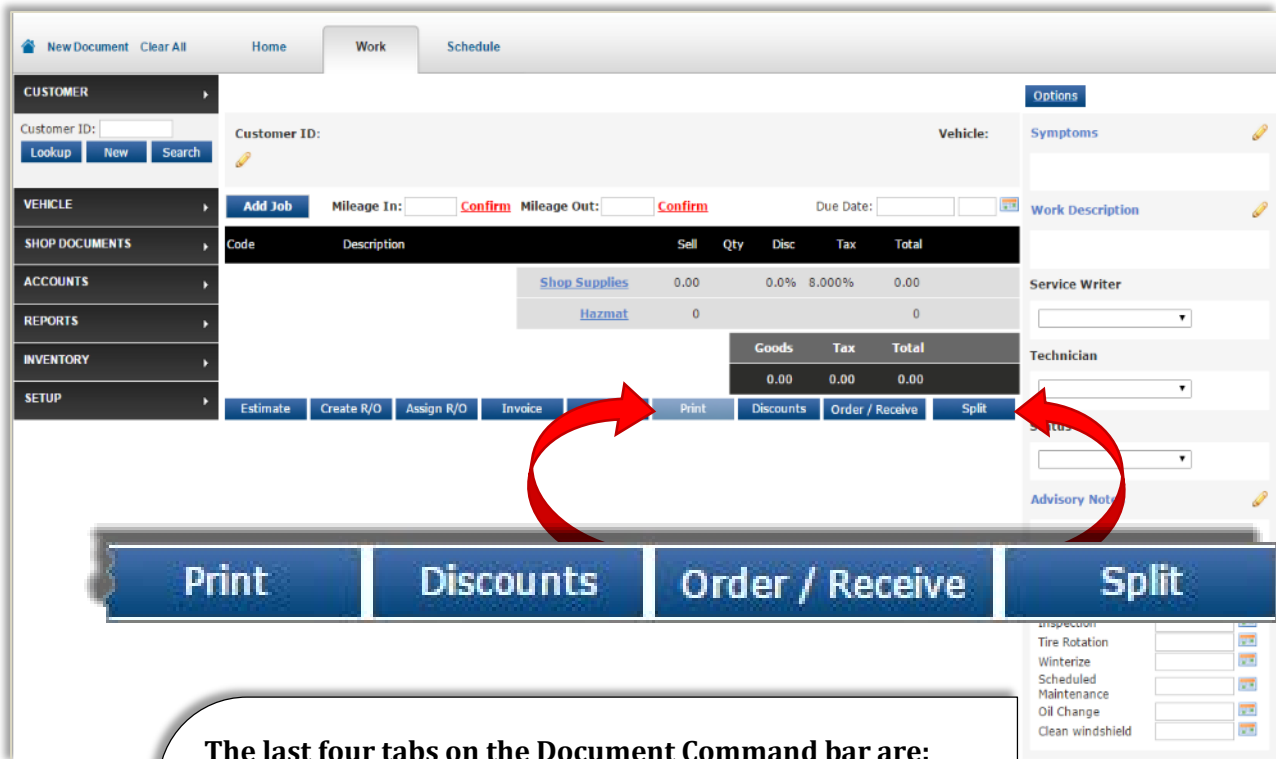
‘Create R/O’ moves an Estimate/Quote *or* an initial work order to the Repair Order state.

‘Assign R/O’ is used with the shop Schedule feature to assign Techs and work hours.

‘Invoice’. Once all the work is completed, click here to record payment and close the work order. Note that this step cannot be undone.

“Credit” is used to issue a credit for parts and/or labor, or the entire amount against a paid invoice.

Document Command Bar, continued



The last four tabs on the Document Command bar are:

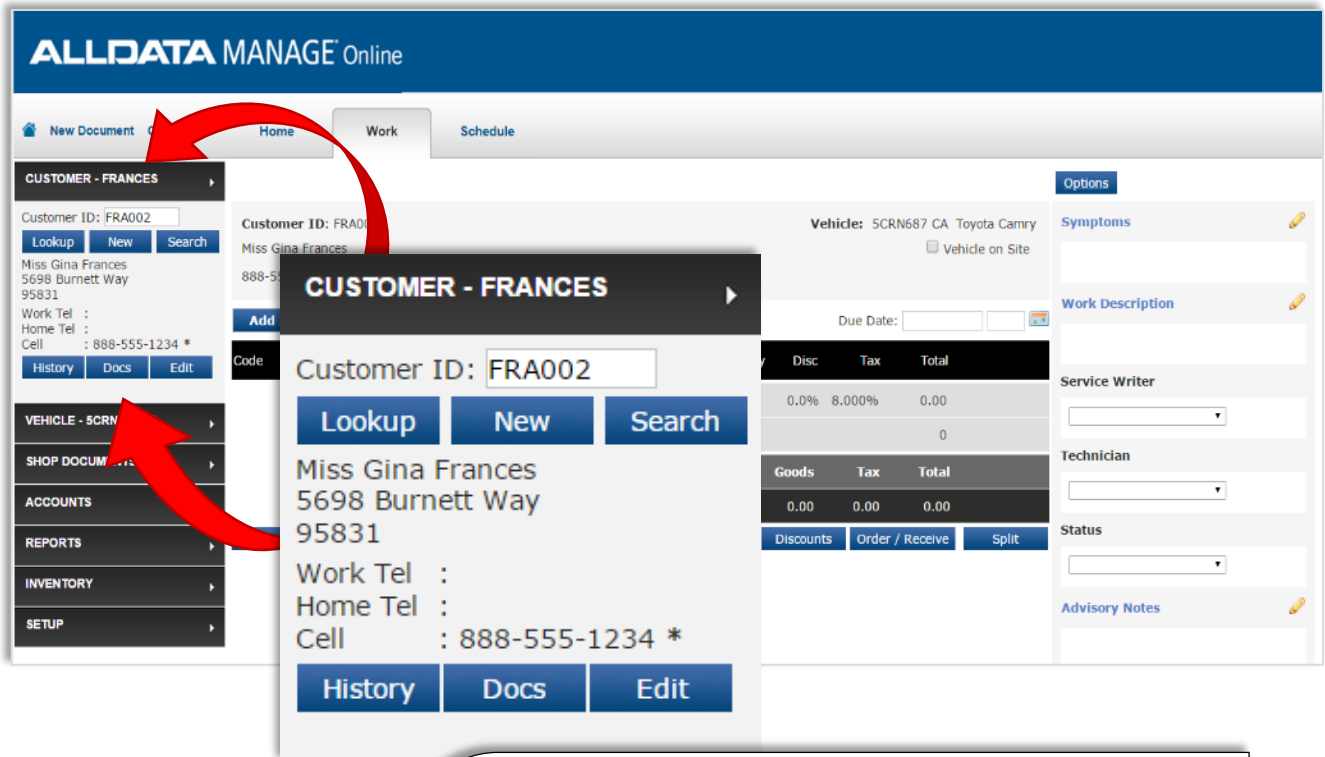
“Print”. This is enabled *after* you have created an Estimate, R/O, etc. When you click Print, it will open a print preview window with options to print or email the document.

‘Discounts’. Click here to open the Discount management section where you can apply discounts as desired. This also shows you the Profit Margins estimator.

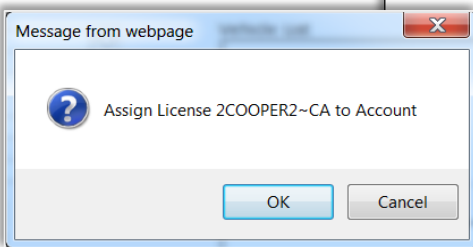
‘Order/Receive’ is used to check on availability of parts, order parts, and then receive them when they are delivered.

‘Split’ is a special feature used *only with third party payers* such as Insurance companies. This allows two or more payers on one invoice.

Left Column - Customer Tab



The Customer tab allows you to 'Lookup' a customer using the customer account number, add a New customer, or use 'Search' to find an existing customer.

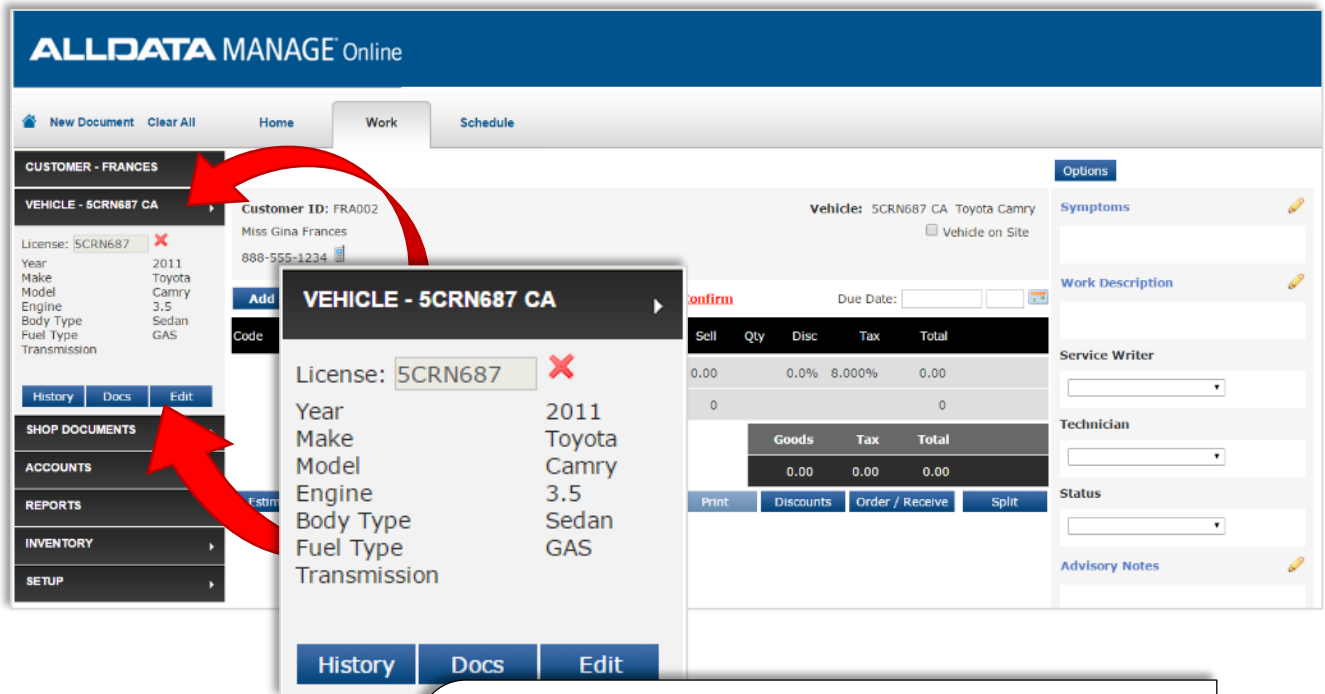


Note - If you use this tab to create a new customer while you have a customer and vehicle displayed, you will be prompted to 'Assign' the current vehicle to the new customer. Unless this is what you want to do, click on 'Cancel', then click on 'Clear All'.

Best practice is to 'Clear All' before creating both a new customer and vehicle.

You can also view all past invoices under "History", find current documents under "Docs" and edit current information by clicking on 'Edit'.

Left Column - Vehicle Tab



The Vehicle tab shows the currently selected vehicle, and has links to the Service History and previous documents.

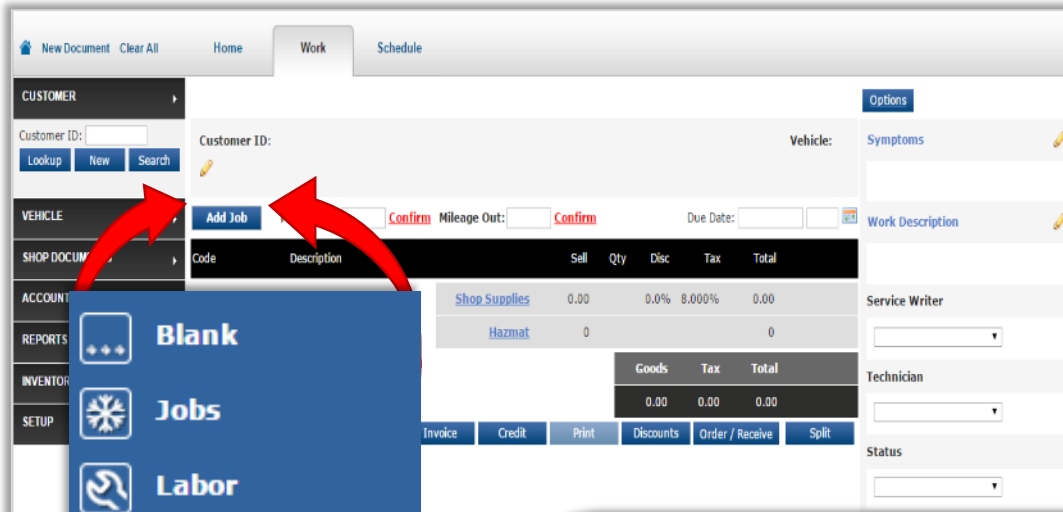
You can also 'Edit' vehicle information here.

Note that the Red **X** is used to *change the vehicle for this customer*. It does NOT CLOSE the vehicle tab, un-assign or delete the vehicle.

Remember!

You can set the Customer tab to open first by going to 'Setup > User Options > General > General Options menu > Start Menu and clicking on 'Customer'.

This is recommended to make adding a new Customer and Vehicle easier.




Use this list to add these items to the Work Order as separate jobs. If you want to include Parts and labor on the *same job*, add a 'Blank Job', then use 'Edit Jobs' to add line items.

“**Add Job**” lets you create multiple jobs on a ticket.

“**Blank**” is used to Name a new Job and add a technician at this point if desired.

Clicking any of these items will add them as a SEPARATE JOB. To add multiple items to ONE Job, use the 'Edit Job' Icon.

 The '**Jobs**' icon allows you to select a pre-built Custom Job for the work order.

Click on “**Labor**” to add a labor line item manually.

Use “**Repair Times**” to access the OE catalog and standard labor times.

“**Maintenance**” gives you access to Manufacturer recommended service interval jobs and information.

“**Parts**” allows you to add a part from your parts list.

“**Quick Parts**” is your list of commonly used items.

“**Catalog**” takes you to the OE and aftermarket catalogs used for electronic parts ordering.

“**Tire Sales**” is exclusively for adding tires and related charges to the work order.

Using the Program

Hands-on Activities

This section gives you a series of exercises where you will add a new customer and vehicle and write a work order in Manage Online.



Important! Be sure to use *the exact VIN numbers where provided*. You will be asked to use your own cell phone number and email address so you can see the customer communication features in action.


For some of the exercises, you will be asked to enter your own email address and/or cellphone number so you can see how some of the features work.

You should *remove your personal information from your database before you use it to 'demo' the product to a customer.*

If the instructions tell you to enter information of your choice, keep in mind that you may be sharing this with a customer during a demonstration. Use realistic information rather than gobble-de-gook such as “dk3t6thhsna” as a customer name, address, or other information.

As you work through the exercises, refer back to the previous pages for the locations of different features and document commands.

Exercise 1. Oil Change

For this exercise, use the customer you entered previously – Ted Sturgeon. If you do not have Ted and his vehicle showing in the Customer tab and Vehicle tab in the *left column*, use the Lookup feature. Enter ‘Stu’ in the Customer ID field and click on ‘Lookup’. When the results appear, click on the green  to select the customer.

Confirm the Mileage In, then go to the Right Column and select a Service Writer.

Adding a Job

For the first job, we will be adding labor and parts for an Oil Change.

In the Work Area, click on 'Add Job'.



When the drop down menu opens, click on 'Blank'.



When the Edit Job window opens, type 'Oil Change' in Description, select a Technician, then click 'Update'.

Note that selecting a Tech is optional; but for this exercise chose one.

Edit Job Description

Description

Technician

Cancel
Update

After you have named the job, you can add additional items to the job by using the 'edit job' feature:

Use the Add Job button ONLY when you want to start a NEW JOB.

To **ADD, EDIT OR DELETE** parts or labor items on any existing job, go to the **RIGHT end** of the job line and click on the **Edit Job** icon.

Add Job

0.0	+	x
0.000%	+	x
0		
Goods	Tax	Total
0.00	0.00	0.00


Estimate
Create R/O
Assign R/O
Discounts
Order / Receive
Split

Notice that the drop down list looks exactly like the list under 'Add Job' with the exception 'Blank Job'.

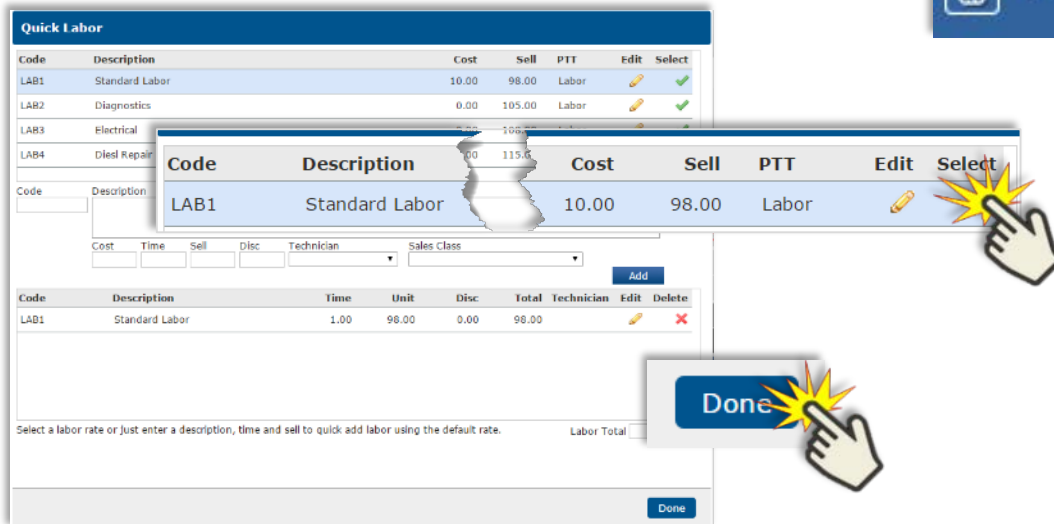
When you add items *from this list*, you are *adding* them to a specific Job.

If you want to start a *new job*, use the list under the 'Add Job' tab.

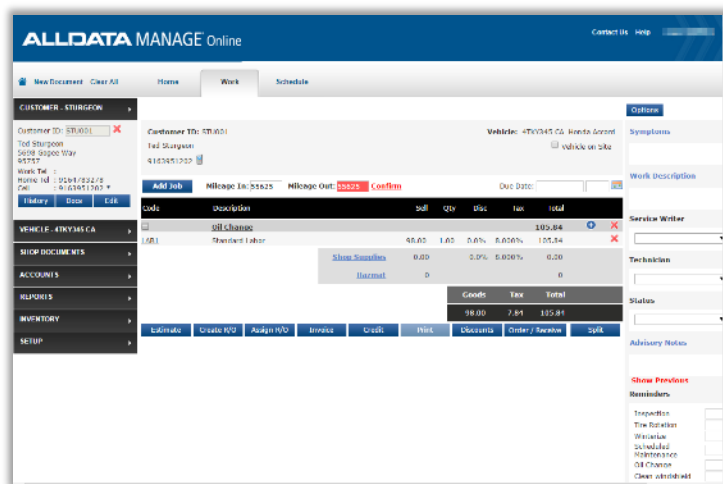
Since we have already created a new job named 'Oil Change', we are going to add a labor line item and parts to that job.

Click on the edit job icon  and select 'Labor' from the list. When the information appears in the *bottom section*, click on 'Done' to add this to the **job**.

Note: 'Labor' allows you to add a labor line item from using the shop's labor codes. **'Labor TIMES'** takes you to the OE catalog where you can select from standard repair times.

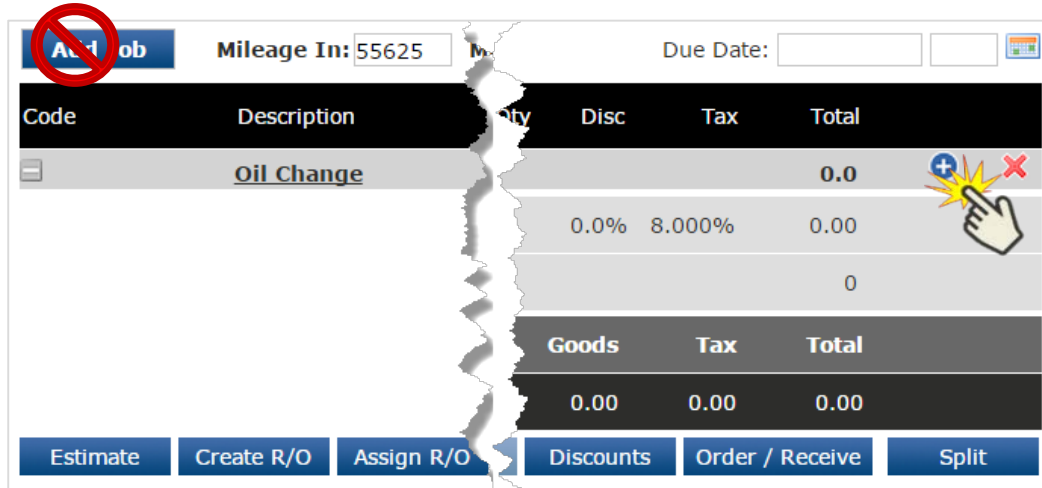


The screen will close and return to the work area after adding each item.



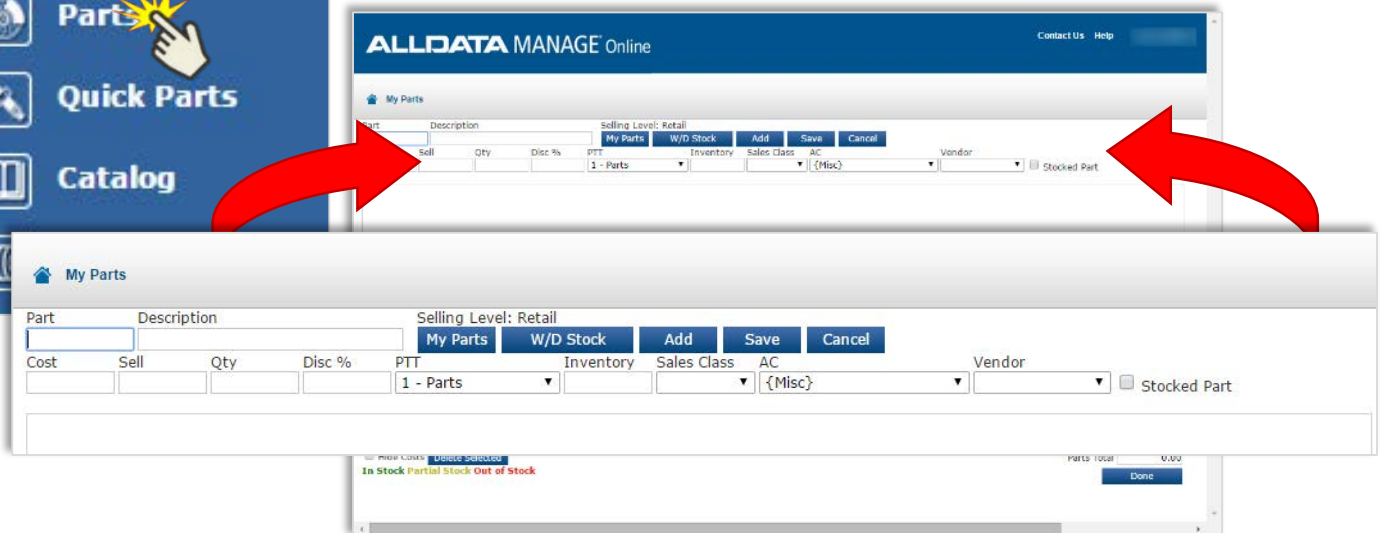
Adding Parts from the Parts List

To add a part to *this job*, click on the 'Edit Job' icon again.



When the add Items list opens, click on 'Parts'

This opens the 'My Parts' window, where you can search for and select a part that is on your Parts List.



Adding a part from the Parts list:

ALLDATA MANAGE Online Contact Us Help

My Parts

Part Description Selling Level: Retail
Oil Filter My Parts W/D Stock Add Save Cancel

Part	Description	Selling Level	Sell	PTT	Stocked	Bin	Vendor
00APH3200	Oil Filter	My Parts	4.38	Parts	✓		MISC
00APH3200	Oil Filter		3.00	2.50	4.38	Parts	AUTOZONEEL
AAAFRA123	Oil Filter		-1.00	3.98	7.96	Parts	NER001
AAAF1223A	Oil Filter - Fram		13.00	26.95	47.16	Parts	NER001
AAAHM3593A	Oil Filter, high mileage FRAM		1.00	7.65	13.39	Parts	D18-2 ALL001

Part Description Qty Unit Disc Total Stocked
00APH3200 Oil Filter 1.00 4.38 0.00 4.38 ✓ ✗

Parts Total 4.38
Done

Legend: In Stock Partial Stock Out of Stock

Instructions: Type 'Oil Filter' in Description, and click on 'My Parts'. When the parts list appears, select an oil filter by clicking on the green checkmark. The part will appear in the lower window. Click on 'Done' to add it to the work order.

Using the 'Quick Parts' list

Once again, go to the Edit Jobs icon. This time select "Quick Parts" from the list.

VALUE POINT!

The Quick Parts/Fluids feature keeps frequently used items in an easy to access list. This saves time when adding them to a work order.



Quick Parts

Quick Parts
 Fluids

Part	Description	Stock	Cost	Sell	Qty	
00510W3	Engine Oil - 10W30	30	1.75	3.50		<input type="checkbox"/>
008BRK	Brake Fluid	42	0.00	0.00		<input type="checkbox"/>
AAA10W40	Cheap Oil	-5	1.39	2.43		<input type="checkbox"/>
AAA10W50	Engine Oil	8	1.39		5.0	<input checked="" type="checkbox"/>
AAA5W20	Engl					<input type="checkbox"/>
AAA5W30	Oil					<input type="checkbox"/>
AAACL-2345	Co					<input type="checkbox"/>

When the Quick Parts window opens, click on 'Fluids'. Locate engine oil on the list and change the Qty to "5", then click 'Done'.

Your work order should now look something like this.

*If you have not done so already, assign a Service Writer and a Technician.

New Document Clear All
Home Work Schedule
Recent Documents

CUSTOMER - STURGEON

Customer ID: STU001 ✖

Ted Sturgeon
5698 Gogee Way
95757

Work Tel :
Home Tel : 9164783278
Cell : 9163951202 *

History Docs Edit

Customer ID: STU001 Vehicle: 4TKY345 CA Honda Accord

Ted Sturgeon Vehicle on Site

9163951202

 Mileage In: 55625 Mileage Out: 55625 Due Date:

Code	Description	Sell	Qty	Disc	Tax	Total		
Oil Change							123.69	✖
LAB1	Standard Labor	98.00	1.00	0.0%	8.000%	105.84	✖	
00APH3200	Oil Filter	4.38	1.00	0.0%	8.000%	4.73	✖	
AAA10W50	Engine Oil	2.43	5.00	0.0%	8.000%	13.12	✖	
Shop Supplies		1.65		0.0%	8.000%	1.78		
Hazmat		0				0		
						Goods		
						Tax		
						Total		
						116.18	9.29	125.47

Options

Symptoms

Work Description

Service Writer

Technician

Status

Advisory Notes

Add a Second Job

Go back to the 'Add Job' tab to put a second job on the work order.

Click on 'Add Job', then 'Blank'.

Enter 'Wipers' in Description and add a technician.

Using the Catalog

Now go to the *Edit Job icon*, and select 'Catalog' from the drop down list. *This takes you to the online parts catalog tab. The AutoZone tab displays by default.*

1: Go to the bottom of the Parts Categories list and click on 'Wiper Blades'.

2: When the 'Select Category' column appears, click on 'Wiper Blade (Windshield) (Select 'Coupe' as the Body Style if asked to)

This is the AutoZone catalog parts list.

Description	Availability	List	Cost	Qty
Wiper Blade (Windshield) Part Number: D01Y2015 Front - The silver blade. Conventional design	Stock - 2	\$15.73	\$0.99	ADD
Wiper Blade (Windshield) Part Number: D01Y2015 Front - The silver blade. Conventional design	Stock - 4	\$14.75	\$0.99	ADD
Wiper Blade (Windshield) Part Number: D01Y2015 Front - The silver blade. Conventional design	Stock - 8	\$14.01	\$0.29	ADD
Wiper Blade (Windshield) Part Number: D01Y2015 Front - The silver blade. Conventional design	Stock - 1	\$22.73	\$12.99	ADD

Select a **Wiper blade** from the list:


3. Find a part that has a GREEN availability indicator. Click on 'Add'.
 (For purposes of this exercise, we're only going to add ONE wiper blade)

4. Go to the UPPER RIGHT corner and click 'Add to Document'

When the screen returns to the work area, you should see a **second job** titled 'Wipers' with one line item for Wiper Blade (Windshield):

Code	Description	Sell	Qty	Disc	Tax	Total	
	Oil Change					123.69	+ X
LAB1	Standard Labor	98.00	1.00	0.0%	8.000%	105.84	X
00APH3200	Oil Filter	4.38	1.00	0.0%	8.000%	4.73	S X
AAA10W50	Engine Oil	2.43	5.00	0.0%	8.000%	13.12	X
	Wipers					118.49	+ X
OWIVCB19	Wiper Blade (Windshield)	11.71	1.00	0.0%	8.000%	12.65	X









Now we need to add a labor line to this job:

Go to the Edit Job icon  and click on “Labor” to add a labor line item

For this job, use LAB1 – Standard Labor.

Click ‘Done’ to add the line item to the work order.



Quick Labor

Code	Description	Cost	Sell	PTT	Edit	Select
LAB1	Standard Labor	0.00	98.00	Labor		
LAB2	Diagnostics	0.00	105.00	Labor		
LAB3	Electrical	0.00	108.00	Labor		
LAB4	Diesl Repair	0.00	115.00	Labor		

Code: Description:

Cost: Time: Sell: Disc: Technician: Sales Class:

[Add](#)

Code	Description	Time	Unit	Disc	Total	Technician	Edit	Delete
LAB1	Standard Labor	1.00	98.00	0.00	98.00			


Select a labor rate or just enter a description, time and sell to quick add labor using the default rate. Labor Total: 98.00

[Done](#)











Editing a line item on a job:

Labor time will default to 1 hour when added to a job. You can easily edit this by using the ‘Quick Edit’ feature.

Estimate: Q002126 [Cancel Estimate](#)

Customer ID: STU001 Vehicle: 4TKY345 CA Honda Accord
 Ted Sturgeon Vehicle on Site
 9163951202 

[Add Job](#) Mileage In: Mileage Out: [Confirm](#) Due Date:

Code	Description	Sell	Qty	Disc	Tax	Total	
Oil Change						123.69	 
LAB1	Standard Labor	98.00	1.00	0.0%	8.000%	105.84	
Q0APH3200	Oil Filter	4.38	1.00	0.0%	8.000%	4.73	 
AAA10W50	Engine Oil	2.43	5.00	0.0%	8.000%	13.12	
Wipers						118.49	 
LAB1	Standard Labor	98.00	1.00	0.0%	8.000%	105.84	
QWIVCB19	Wiper Blade (Windshield)	11.71	1.00	0.0%	8.000%	12.65	
Shop Supplies		2.82		0.0%	8.000%	3.05	
Hazmat		0				0	
Goods						227.06	
Tax						18.17	
Total						245.23	

Estimate
Create R/O
Assign R/O
Invoice
Credit
Print
Discounts
Order / Receive
Split

Quick Edit

Estimate Create R/O Assign R/O Invoice Credit

Description

Reconditioned

Technician

Cost 0.00

Sell 98.00

Qty 0.5 Bin

Discount % 0.00

Product Tax Type 2

Sales Class 4001 - Labor Sales

Total (inc tax) 52.92 Margin 80.00%

Close Update Part Audit

Change the Qty from 1.0 to 0.5.
Click on 'Update' to apply the change.

VALUE POINT!

The Quick Edit window can also be used to change information on parts, apply, edit or remove a discount on a line item, or add or change a technician. This can be a great time saver for a busy Service Writer.

Creating an Estimate/Quote

Go to the Document Command bar at the bottom of the work area and click on 'Estimate'

New Document Clear All Home Work Schedule

CUSTOMER - STURGEON Estimate: Q002126 Cancel Estimate

Customer ID: STU001 Ted Sturgeon 5698 Gogee Way 95757 Work Tel : Home Tel : 9164783278 Cell : 9163951202 *

Vehicle: 4TKY345 CA Honda Accord Vehicle on Site

9163951202

Add Job Mileage In: 55625 Mileage Out: 55625 Confirm Due Date:

Code	Description	Sell	Qty	Disc	Tax	Total
	Oil Change					123.69
LAB1	Standard Labor	98.00	1.00	0.0%	8.000%	105.84
00APH3200	Oil Filter	4.38	1.00	0.0%	8.000%	4.73
AAA10W50	Engine Oil	2.43	5.00	0.0%	8.000%	13.12
	Shop Supplies	1.65		0.0%	8.000%	1.78
	Hazmat	0				0

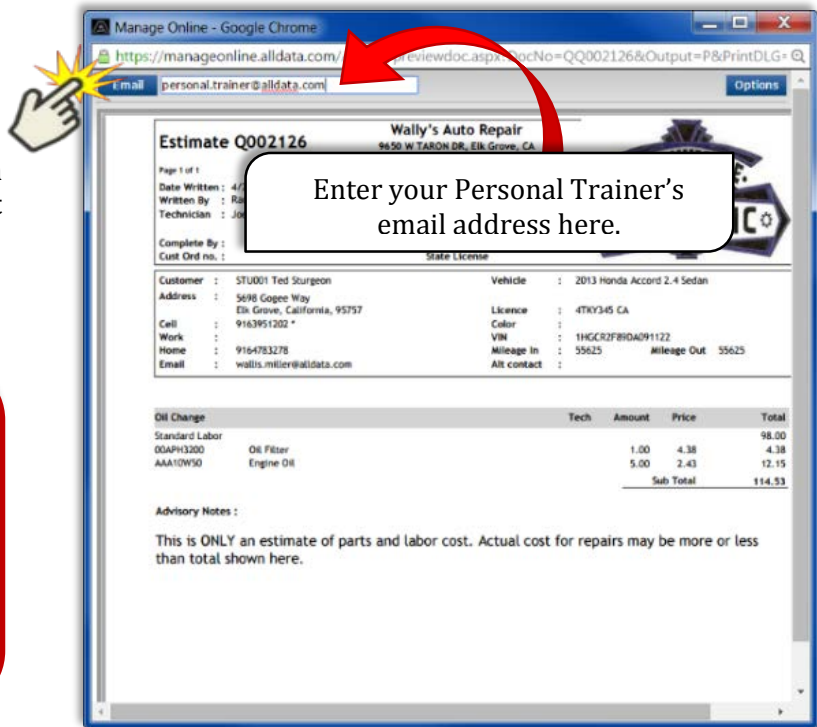
Estimate Create R/O Assign

If the print preview window did NOT open when you clicked Estimate*, click **Print** now.

*This is an option that can be selected by going to: Setup > User Options > Print Settings



Enter your personal trainer's ALLDATA email address in the space next to the **Email** icon in the upper left corner of the print preview, then click on the icon to send this document as a PDF attachment.

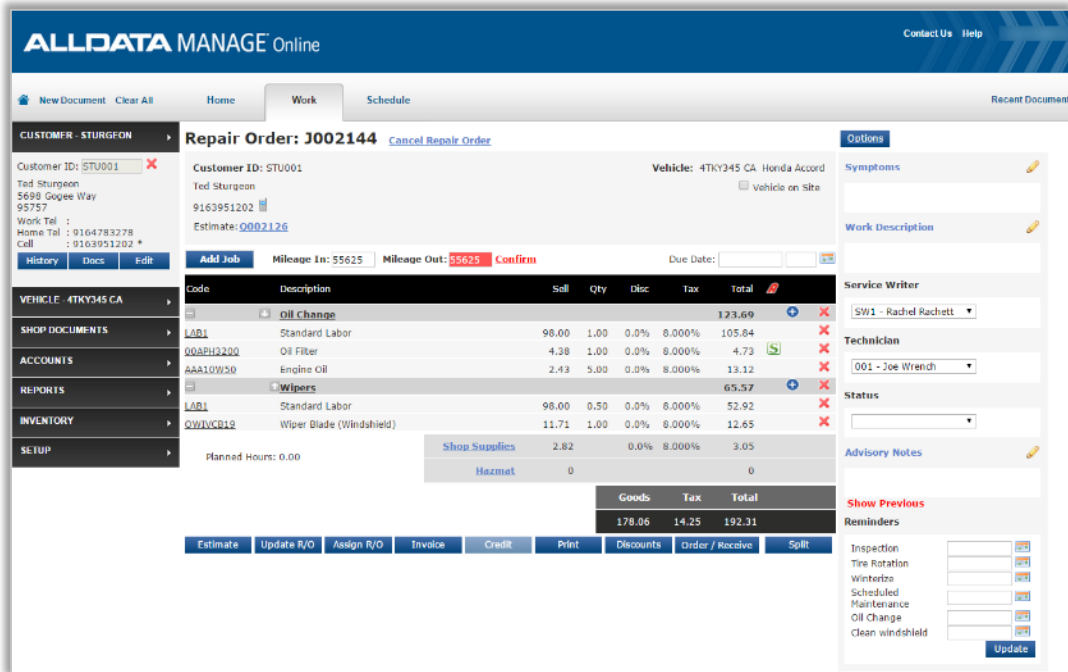


VALUE POINT!

The email option allows a shop to provide copies of estimates, R/Os and Invoices to a customer who can't be right there. This ensures they have accurate information regarding the needed repairs or service.

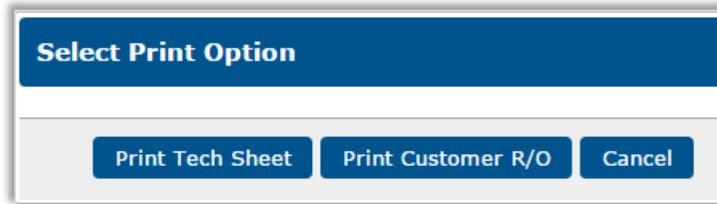
Creating a Repair Order

Creating a Repair Order is easy – simply click on the Create R/O tab in the Document Command bar:



Repair Order Print Options

When you print a Repair Order, you will have two options:



The Tech Sheet is the worksheet a shop gives to the technician to tell them what needs to be done and how long it should take them. There are no prices or labor costs on the tech worksheet, nor do the standard disclaimer, headers/footers or shop logo (if used) appear on the document.



For this exercise, print the Tech Sheet and send it to your personal trainer the same way you did the Estimate in the previous exercise.

Ordering Parts

This section shows how to order parts electronically. We will use a part from the AutoZone catalog, but the process is same for other electronic parts catalogs.

Repair Order: J002144 [Cancel Repair Order](#)

Customer ID: STU001
Ted Sturgeon
9163951202
Estimate: Q002126

Vehicle: 4TKY345 CA Honda Accord
 Vehicle on Site

Add Job Mileage In: 55625 Mileage Out: 55625

Code	Description						
Oil Change							
LAB1	Standard Labor						
00APH3200	Oil Filter						
AAA10W50	Engine Oil						
Wipers							
LAB1	Standard Labor	98.00	0.50	0.0%	8.0%		52.92
OWIVCB19	Wiper Blade (Windshield)	11.71	1.00	0.0%			12.65
Shop Supplies							
		2.82		0.0%			3.05

Planned Hours: 0.00

178.06 14.25 192.31

Print Discounts Order / Receive Split

Estimate Update R/O Assign R/O Invoice Credit Print Discounts Order / Receive Split

The Order/Receive tab is located on the right side of the Document Command bar. This is used to for both electronic parts ordering and to order parts by email if a vendor does not have an online catalog.

When you click on 'Order/Receive', the order window opens:

Check the 'Select' box for the parts to be ordered.
(For this exercise, we are ordering ONLY THE WIPER BLADE.)
 Click on 'Inquiry'. The part should display an Available message.
 Click on 'Order'

Part	Description	QTY	UNIT PRICE	TOTAL PRICE	STATUS	SELECT
00APH3200	Oil Filter	1.0	6.69	6.69		<input type="checkbox"/>
AAA10W50	Engine Oil	1.0	11.71	11.71		<input type="checkbox"/>
OWIVCB19	Wiper Blade (Windshield)	1.0	6.69	6.69	-1.0 AutoZone	<input checked="" type="checkbox"/>

Available
AutoZone - AutoZone

Inquiry
Order
Receive

Order Confirmation

Order to : AutoZone
 Total Items : 1
 Order Value: 6.69
 Order Type : **Online**

Special Instructions

When the Order Confirmation window opens, the shop has the option of entering any special instruction before ordering.
 Click on 'Order'. When the PO Number displays on the order line, you can click on the Work tab to return to the Repair Order.
 You should see a yellow ✓ indicating the part is on order.

Cancel Order

Wipers					65.57	+	×
LAB1	Standard Labor	98.00	0.50	0.0%	8.000%	3.92	×
OWIVCB19	Wiper Blade (Windshield)	11.71	1.00	0.0%	8.000%	✓	×
Planned Hours: 0.00		Shop Supplies		2.82	0.0%	8.000%	3.05
		Hazmat		0			0

Receiving Ordered Parts

Quick Part Entry
 Part Code Description Qty [Add To Order](#)

Parts for: R/O J002144 Vehicle: 4TKY345 CA Honda Accord 2.4

Part	Description	Qty	Cost	Sell	Total	Mv Stock	Supp	Status	Select
								AUTOZONEEL - AutoZone	<input type="checkbox"/>
								Please select a vendor...	<input type="checkbox"/>
								P003068	<input checked="" type="checkbox"/>
									Select All: <input type="checkbox"/>

[Inquiry](#)
[Order](#)
[Receive](#)

Min Order Order Total 6.69

Update document / databases prices Cost Sell

When the part is delivered, click on 'Order/Receive' again.

Locate the part (you will see a PO number in green), check the 'Select' box, and then click on 'Receive'.

After the Status changes to 'Received', click on the Work tab to return to the work order.

Completing the Work Order

We'll assume the work has been completed and the vehicle is ready to go. The shop needs to notify the customer to come pick up their car. With Manage Online, they can text the customer that their vehicle is ready.

[New Document](#) [Clear All](#) [Home](#) [Work](#) [Schedule](#)

CUSTOMER - STURGEON **Repair Order: J002144** [Cancel Repair Order](#)

Customer ID: STU001

Ted Sturgeon
 5698 Gogee Way
 95757
 Work Tel : 800-555-1212
 Home Tel : 800-555-1212 *
 Cell : 800-555-1212 *

[History](#) [Docs](#) [Edit](#)

VEHICLE - 4TKY345 CA

SHOP DOCUMENTS

ACCOUNTS

REPORTS

INVENTORY

SETUP

Customer ID: STU001

Ted Sturgeon

800-555-1212

Estimate: Q002144

								123.69	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
98.00	1.00	0.00%	8.0000%	105.84					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
4.38	1.00	0.00%	8.0000%	4.73					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
2.45	5.00	0.00%	8.0000%	13.12					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
								65.57	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
98.00	0.50	0.00%	8.0000%	52.92					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
11.71	1.00	0.00%	8.0000%	12.65					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Shop Supplies								2.82	0.00%	8.0000%	3.05
Hazmat								0			0
								Goods	Tax	Total	
								178.06	14.25	192.31	

Planned Hours: 0.00

[Estimate](#) [Update R/O](#) [Assign R/O](#) [Invoice](#) [Credit](#) [Print](#) [Discounts](#) [Order / Receive](#) [Split](#)

Click on the small cellphone icon to open the Text Message window.

Text Message

Send message to Mr Ted Sturgeon on 800-555-1212

Available Credit 0

Predefined Messages: Services Complete ▾

[TITLE] ▾ **Add**

Message:

Dear [TITLE] [LASTNAME],

Your [MAKE] [MODEL] is ready to pick up. The total amount due is [VALUE].

Message Preview (character count: 27):

Dear Mr Sturgeon,

Your Honda Accord is ready to pick up. The total amount due is 192.31.

VALUE POINT!

The Text Customer feature saves time spent contacting the customers to come pick up their vehicles.

Close **Send**

Closing the Work Order

When the customer arrives to pick up their vehicle, it's time to close the work order by converting it to an Invoice. ***This is the final step in the work order process, and cannot be reversed once complete.***

Best Practice for a Shop – DO NOT convert the Repair Order to an Invoice until the customer is on site to pick up the vehicle

If you have closed the Repair Order by clicking on 'Clear All', go to the Shop Documents tab and retrieve it now.

To Close an Invoice:
Click on 'Invoice' in the Document Command bar.

Item	Quantity	Price	Tax	Total
LAB1 Standard Labor	98.00	1.00	8.000%	105.84
00APH3200 Oil Filter	4.38	1.00	8.000%	4.73
AAA10W50 Engine Oil	2.43	5.00	8.000%	13.12
Wipers				65.57
LAB1 Standard Labor	98.00	0.50	8.000%	52.92

Goods	Tax	Total
178.06	14.25	192.31

This will open the Invoice Confirmation window.

Invoice Confirmation

Customer: STU001 Mr Ted Sturgeon Individual

Invoice Date: 05/01/2015

Service Writer: 001 - Joe Wrench

Invoice Summary	Goods	Tax	Total
	178.06	14.25	192.31

Payment Details: Method: CreditCard, Ref Paid May 01 2015, Tendered: 192.31, Balance: 0.00

Invoice Confirmation

Invoice Confirmation

Customer: **STU001** Mr Ted Sturgeon
Individual

Invoice Date: 05/01/2015

Customer Order Number: []

Assign Sales Class to invoice: []

Service Writer: SW1 - Rach []

Technician: 001 - Jos []

Mileage In: 55625

Mileage Out: 55625 **Confirm**

Media Code: []

Invoice Summary

Payment Details

Method: CreditCard

ACRE - AC recharge
EML - Email campaign
LOF1 - Oil Change
RAD - Radio Advertisement
SCH - Scheduled Maintenance
SFCR - Safe Car Inspection
SP1 - Coupon campaign1
SVI - Serv Interval
WEB - Internet Search
WIP - Walk In
WOM - Word of Mouth

Cancel Pay Later Invoice Draft

Method: cash
CreditCard
Debit
VISA

If you did not confirm Mileage Out before clicking on Invoice, do so now.

Select a Media Code from the Drop-down List. (This is used with the CRM feature)

Choose the method of Payment from the drop-down list, then click 'Pay'.

Home Work Schedule

Invoice: I002145 05/01/2015 Paid

Customer ID: STU001
Mr Ted Sturgeon
800-555-1234
R/O: []
Estimate: I002126

Add Job Mileage In: 55625

The final Invoice and the date Paid. Notice that the 'Add Job' button is now disabled.

Code	Description	Sell	Qty	Disc	Tax	Total
Oil Change						
LAB1	Standard Labor	98.00	1.00	0.0%		
00APH3200	Oil Filter	4.38	1.00	0.0%		
AAA10WS0	Engine Oil	2.43	5.00	0.0%		
Wipers						
LAB1	Standard Labor	98.00	0.50	0.0%		
QWIVCB19	Wiper Blade (Windshield)	11.71	1.00	0.0%		
Shop Supplies		2.82		0.0%		
Hazmat						
		Goods				
					Tax	Total
		178.06			14.25	192.31

Estimate Create R/O Assign R/O Invoice Credit Print Discounts Order / Receive Split

The only Document Commands available are 'Credit', 'Print' and 'Discounts'; which is a view only option after the Invoice is closed



Go to the Document Command bar and click on 'Print'. When the Print Preview window opens, email this to your personal trainer the same way you did with previous documents.

The Printed Invoice:

Invoice I002145
 Wally's Auto Repair
 9450 W TARDON DR, Elk Grove, CA
 Elk Grove, CALIFORNIA, 95753-8197
 Phone 916-395-1202

THE HUMBLE MECHANIC

Date Written: 5/11/2015
 Written By: Rachel Rachett
 Technician: Joe Winch
 Estimate #: Q002120
 Repair Order: J002144
 Cust Ord no.:

Vehicle: 2013 Honda Accord 2.4 Sedan
 License: 4TRK345 CA
 Color:
 VIN: 1HGCR2F890A091122
 Mileage In: 55625
 Mileage Out:
 Alt Contact:
 State License:
 Fax:
 training.alldata.com
 wally.miller@alldata.com
 Smog Inspection
 Local Business
 State License

Customer	Address	City	State	Zip	Phone	Fax
STU001 Mr Ted Sturgeon	5698 Gogge Way	Elk Grove, California	95757	800-555-1212	800-555-1212	

Dil Change	Tech	Amount
Standard Labor		1.47
Q04P4320 Oil Filter		5.50
AAA10W50 Engine Oil		5.50

Wipers	Tech	Amount
Standard Labor		1.47
QW1FC819 Wiper Blade (windshield)		1.47

Advisory Notes:
 Payment is due upon completion of repairs and/or services unless otherwise noted.

Original Estimate Total:	Total Labor
192.31	147.00

Authorization Method:
 email text phone fax person

Date/Time:
 Contact Details:
 Authorized By:
 Signed: _____

Payment Date	Method	Amount	Payment Totals
05/01/2015	CreditCard	192.31	192.31

Total Parts	Hazmat *	Supplies *	Total Taxes	Total Invoice
28.24	0.00	2.82	14.25	192.31

Payment Totals : 192.31
 Balance Due : 0.00

* Shop Supply & Hazmat Fees: This charge represents costs and profits to the motor vehicle repair facility for motor shop supplies, and/or waste removal.
 All work guaranteed for 30 days unless otherwise noted.
 Unless otherwise stated by the manufacturer, all parts are warranted for 30 days.

The printed Invoice now shows the Payment Details

You have now created and processed a work order from start to finish.

The following exercises are included for you to practice using Manage Online. While you are not required to send any of the documents from these work orders to your personal trainer, you should complete each one.

There are several areas that require you to determine the correct way to create items or enter information on your own. If you find you need help, contact your personal trainer, review the training modules and YouTube videos, or call the Training Department at 800-684-6840.

Additional Activities


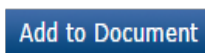
Activity 1: Writing a Work Order for a Brake Job

Jill is a first time customer into your shop and she tells you that her brakes have been making a squealing sound when she applies her brakes.

Create a New Customer

1. Click on the **Customer** tab and click **New** and enter the following information.
2. Title/Name: Miss Jill McQueen
3. Address: 9000 Calisto Drive
4. Zip Code: 95831 (click Lookup to fill City and State)
5. Payment Terms: 'TOS – Time of Service'
6. 'Cust Type': 1-Individual
7. Click 'Save'

Add Jill's Vehicle

8. Go to the Vehicle Tab and click on New
9. Enter the License number: **BADGRL1**
10. Use the VIN Decoder to select the vehicle: **4T4BF3EKXBR208905**. Use the first vehicle listed.
11. Click 'Save'.
12. Click on Symptoms and enter '*Brakes squeal when applied*'
13. Select a Service Writer
14. Click on 'Add Job' and select 'Jobs'. This opens the Customer Jobs list.
15. Select 'Mech Diag' to add a Diagnostic job.
16. Go back to 'Add Job' and click on 'Blank'. Name the Job 'Brakes' and assign a technician
17. Go to the Edit Job icon for the Brakes job and click on 'Labor Times' to access the OE catalog.
18. Select the following:
 - Brakes and Traction Control > Disc Brake System > Brake Pad
19. Select the **LABOR** for 'Replace Brake Pad / Front Pads / Pads'
20. Now click on the AutoZone Catalog tab and find the 'Basket Linked Part Categories' at the *bottom left* of the screen, under the Parts Categories list.
21. Click on 'Brake Pads – Front'.
22. When the parts list displays, select a set of Brake Pads that have a GREEN availability indicator.
23. Go to the upper *Right* corner and click on the Shopping Basket icon.  **2 Items** 
- You should have 1 labor item and 1 part in your basket.
- Click on 'Add to Document' and change the work order to an Estimate

The Service Writer gives Jill a phone call to her cell number. He goes over the Estimate with her and explains the technician confirmed her brake pads need replacing. He would give her the cost involved for the work. Jill approves the work to be done.

24. Click on 'Order/Receive' to order the parts.

- Select the part and click on 'Inquiry'. When the Status changes to 'Available', click on 'Order' to open the Order Confirmation window. Click on 'Order' in this window.

Reminder – you need to click on the 'Work' tab to return to the work area.

Note that ordering the parts has automatically changed the Estimate to a Repair Order.

25. Click on Order/Receive again and "Receive" the parts.

26. Return to the Work Area and click on 'Invoice'. If you have not done so already, you will be prompted to confirm Mileage In and Mileage Out.

27. Select a payment Method and click on 'Pay'.

Click on 'Clear All' to reset the work area for the next customer.

Activity 2: Writing a Work Order to replace water pump

Purpose of this activity: At the conclusion of this activity you will be able to create and save symptoms quickly, add a work description and use the 'catalog' link as opposed to 'repair times'.

1. Create a New Customer with the following information:

Name: Mr. Al Bester

Address: 8976-A Galaxy Blvd.

Zip Code: 95828 and click: Lookup

Payment Terms: 'TOS-Time of Service'

Cust Type: '1-Individual'

Click Save

2. Add Al's Vehicle; use the VIN Decoder with 2G1FB1E35D9154253

2003 Chevrolet Camaro LS

License number: 7RFG900

Al tells the Service Writer he has noticed 'fluid leaking from the front of his engine'.

1. Click on the Work tab
2. Enter and confirm the mileage 26164
3. Add a Service Writer
5. Click on 'Symptoms' and enter "Fluid leak – front of engine", then click "Add" and "Save".
(This puts the new symptom on the drop down list for future use)
6. Click on Add Job and select 'Jobs > 'Diagnose Mech'.
7. Add a Technician.

Once the technician has looked at the vehicle they report the water pump is leaking and is in need of replacement

8. Click on Add Job > Blank. Name the Job 'Cooling System'
9. Go to the Edit Job icon and select Catalog
10. When the AutoZone catalog opens, 'Cooling and Heating' and select 'Water Pump'
11. Add a Water Pump, then click on the OEM tab (to the left of AutoZone)
12. Go to the Basket Linked Part Categories link and click on 'Water Pump'. Locate the Labor to Replace Water pump and click Add. You should have a labor item and a part in your shopping cart.
13. Click on Add to Document.
14. Go back to the Edit Job icon and Click on Quick Part> Fluids. Find any Antifreeze or coolant and add 2 to the work order.
15. Convert the work order to an Estimate and click Clear All.

The Service Writer will call Al and let him know that the technician has inspected the vehicle and found that the water pump is leaking and is in need of replacement.

Activity 3: Using 'Lookup' to find a Customer, retrieving a document and using the 'Deferred Work' feature.

16. Open the Customer tab and type in the first three letters of the customer's last name: BES. Click Lookup.

When the 'Customer Search' window opens, you should see Al Bester. This would display all customers whose last names start with 'BES'. In this case, there is only one.

17. Click on the green checkmark to select the customer.
18. A popup window will appear with the message "There are outstanding Estimates / Jobs for this vehicle, would you like to view them?" Click OK
19. Find the Estimate and click the green check mark to open it in the work area.

Al mentioned that he thinks his Camaro is due for maintenance, and wants to know what should be done.

20. Go to 'Add Job' and click on 'Maintenance'.
21. When the Maintenance list opens, select "30000 Miles or 48000 Kilometers" from the list.
22. A list of items suggested for 'Normal Service' displays. Click on 'Add', then 'Add to Document'.

The Service Writer contact Al and tells him what is needed and how much it costs. Al decides to wait for to have the Maintenance done.

23. Go to the right side of the Scheduled Maintenance job line and click on the Red X next to the Edit Job icon.
 24. When the Delete or Defer Job window opens, click on 'Defer'
 25. Select "4 weeks" from the drop down list for Due Date. For Reason, select NRG – No reason given, select the service writer and click 'Defer'.
- Notice that the Vehicle tab now displays a 'View Deferred Jobs' icon.

After you have completed these exercises, go into Manage Online and explore some of these features:

- Messages -> Go to Setup > User Options > Messages.
 - "Reminders" messages are used to send notifications about Reminders that have been added to a work order, and to send notifications that Deferred work is due.
 - "General" messages can be used to send almost anything else – marketing campaigns, messages to customers that haven't been in in a while, messages for specific YMM cars; the list is endless.
 - For both categories, you can send a text message or email or both.
- Customer Relationship Manager > Go to Reports > Customer Relationship Man.
 - Use this feature to *send* the messages you have created.
- Analysis Reports > Media Analysis *or* Turnover by Media Code
 - Find out how well your Reminders, Deferrals and Marketing campaigns are doing by combing the 'Media Code' feature with these reports.

For more information on how these features work together, watch the "CRM" modules on the Training Garage.

- Inventory > Suggest Order can help a shop use this feature to quickly identify normally stocked items that need to be reordered.
- Stock Movements, Stock Count, and Stock Usage > these reports help a shop manage their inventory whether it is a few items or many.

Glossary for Manage Online

CRM

Customer Relationship Management is a system for managing a company's interactions with current and future customers. It involves using technology to organize, automate and synchronize sales, marketing, customer service, and technical support.

CSV file

A common, relatively simple file format needed to transfer information from a database program for import to a spreadsheet program.

EPO

Electronic Parts Ordering. Used in Manage Online for ordering parts from vendors such as AutoZone.

Estimate

An estimate is how much the seller thinks the job will cost. The actual price may be more or less, but it shouldn't be too much more. (Once a technician has had an opportunity to inspect the vehicle closely, a repair order can be created which will list parts needed along with the cost for the parts and shop labor costs.)

Media Code

Within Manage Online, Media Code is used to track campaigns a shop uses to generate new customers and business. These campaigns can be advertisements in the newspaper, radio spots, mailers, etc. Each campaign can be assigned a "Media Code", and using Manage Online, the user will be able to track where their customers either heard about their shop or the reason they come back into the shop.

Prefix

A fixed price.

Quote

A quote is an offer to do a job for an exact price. If you accept the quote then the seller can't charge you more than the agreed price. It is best to get the quote in writing in case there are any problems later.

R/O

Repair Order. This is a form that Manage Online as well as Manage Elite can generate.

VIN

A **vehicle identification number**, commonly abbreviated to **VIN**, is a unique code including a serial number, used by the automotive industry to identify individual motor vehicles.