

Manager SE Configuration Information Gathering

Recording your shop's essential information now will definitely make best use of the setup/training time.

1. Business Specifics

Shop Data 1		Shop Data 2
Shop Name:		Manager Name:
Street Address:		Manager Title:
Zip/Postal Code:		License 1:
City:	State:	License 2:
Phone:		Slogan:
Fax:		
Email:		Comment:
Website:		
Business Hours (Scheduler)		Holidays (Scheduler)
Mon-Fri = Sat = Sun =		Import standard holidays Y / N Additional holidays by date or pattern:

2a. Tax Rate

Description	Material Rate	Labor Rate	Default
1. Sales Tax	%	%	<input checked="" type="checkbox"/>
2.	%	%	

2b. Compound Taxes

Optional: In most shops, only the standard Tax Rate Table (above) is used.

Description	Rate %	GL Code
Tax #1		
Tax #2		

3. Personnel: Manager

(optional; doesn't get assigned; no wage impact)

Manager Name:	Last:	First:
Address:		
Zip Code:	City:	State:
Phone 1:	Phone 2:	
Email address:		Birthday: __/__/__
Notes:		
Wage Info:	Hourly or Salary? <i>Circle one</i>	Rate:
Pay Period Hours: 40 or 80? <i>Circle one</i>		Commissions (below)
Parts: %	Labor: %	Sublet: %
Profit, Sale or None	Profit, Sale or None	Profit, Sale or None

Service Writer #1

Choose 'Service Writer' for Written By list.

Service Writer Name:		Last:	First:
Address:			
Zip Code:		City:	State:
Phone 1:		Phone 2:	
Email address:			Birthday: __/__/__
Notes:			
Wage Info:	Hourly or Salary? <i>Circle one</i>		Rate:
Pay Period Hours: 40 or 80? <i>Circle one</i>			Commissions (<i>below</i>)
Parts: %	Labor: %	Sublet: %	
<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	

Service Writer #2

Choose 'Service Writer' for Written By list.

Service Writer Name:		Last:	First:
Address:			
Zip Code:		City:	State:
Phone 1:		Phone 2:	
Email address:			Birthday: __/__/__
Notes:			
Wage Info:	Hourly or Salary? <i>Circle one</i>		Rate:
Pay Period Hours: 40 or 80? <i>Circle one</i>			Commissions (<i>below</i>)
Parts: %	Labor: %	Sublet: %	
<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	

Service Writer #3

Choose 'Service Writer' for Written By list.

Service Writer Name:		Last:	First:
Address:			
Zip Code:		City:	State:
Phone 1:		Phone 2:	
Email address:			Birthday: __/__/__
Notes:			
Wage Info:	Hourly or Salary? <i>Circle one</i>		Rate:
Pay Period Hours: 40 or 80? <i>Circle one</i>			Commissions (<i>below</i>)
Parts: %	Labor: %	Sublet: %	
<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	

NOTE: If a service writer also performs work in the shop, they should also be added as a technician, so that they appear on the labor/parts technician lists, to be selected and assigned to work.

Technician #1

Choose 'Technician' for Labor/Parts Tech list.

Technician Name:	Last:	First:
Address:		
Zip Code:	City:	State:
Phone 1:	Phone 2:	
Email address:	Birthday: __/__/__	
Notes:		
Wage Info:	Hourly or Salary? <i>Circle one</i>	Rate:
Pay Period Hours: 40 or 80? <i>Circle one</i>		Commissions (<i>below</i>)
Parts: %	Labor: %	Sublet: %
<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>

Technician #2

Choose 'Technician' for Labor/Parts Tech list.

Technician Name:	Last:	First:
Address:		
Zip Code:	City:	State:
Phone 1:	Phone 2:	
Email address:	Birthday: __/__/__	
Notes:		
Wage Info:	Hourly or Salary? <i>Circle one</i>	Rate:
Pay Period Hours: 40 or 80? <i>Circle one</i>		Commissions (<i>below</i>)
Parts: %	Labor: %	Sublet: %
<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>

Technician #3

Choose 'Technician' for Labor/Parts Tech list.

Technician Name:	Last:	First:
Address:		
Zip Code:	City:	State:
Phone 1:	Phone 2:	
Email address:	Birthday: __/__/__	
Notes:		
Wage Info:	Hourly or Salary? <i>Circle one</i>	Rate:
Pay Period Hours: 40 or 80? <i>Circle one</i>		Commissions (<i>below</i>)
Parts: %	Labor: %	Sublet: %
<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>

4a. Labor Rates

NOTE: Line 1 defaults are assigned to new customers automatically during entry. Click on Type to make exceptions.

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

4b. Discount (Price Levels; retail and otherwise)

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

5a. Shop Supplies

NOTE: States (CA) may require itemized shop supplies; if so, set Shop Supplies to Off; create parts kit of shop supply items.

Shop Supplies	
% of Sales	%
Percent of ...	<input type="radio"/> Labor <input type="radio"/> Parts <input type="radio"/> Both
Maximum \$	\$
Account Class	Shop Supplies Revenue
Report Description (EST/RO/INV text customer sees)	Shop Supplies
Default Setting	On Off
Taxable	Yes No

5b. Hazardous Materials

NOTE: Report Description might be changed to 'Environmental Fee' or similar for improved customer acceptance.

Hazardous Materials	
% of Sales	%
Percent of ...	<input type="radio"/> Labor <input type="radio"/> Parts <input type="radio"/> Both
Maximum \$	\$
Account Class	HazMat Revenue
Report Description (EST/RO/INV text customer sees)	Hazardous Materials
Default Setting	On Off
Taxable	Yes No
Include Sublet (more \$ for % calculations)	Yes No
Behavior (tax as labor or part item; special cases as needed)	Labor Part

6a. Standard Accounts [Setup pages 9-10] Show standard set to accountant; should agree to use.

6b. Account Classes [Setup pages 9-10] Class assignments match descriptions, one-for-one.

7a. Markup

Markup	Markup	Profit
Sublet	%	%
Parts Guide (Estimator)	%	%
Labor Guide (Estimator)	%	%
Labor markup applies to: Sale Only (House) OR Sale + Tech Pay (shared)?		
Shop Overhead	%	%
Misc. Overhead	%	%

7b. Price Markup Matrix

Price Markup Matrix				
Range	From	To	Markup	Profit Margin
1.	\$0.00	\$	%	%
2.	\$	\$	%	%
3.	\$	\$	%	%
4.	\$	\$	%	%
5.	\$	\$	%	%
6.	\$	\$	%	%
7.	\$	\$	%	%
8.	\$	\$	%	%
9.	\$	\$	%	%
10.	\$	\$999999.00	%	%

8a. Default Settings

Default Settings	Suggested	Default Settings	Suggested
Area Code		Convert INV to RO on Change	<input checked="" type="checkbox"/>
Promised Time	5:00 PM?	Warn on Program Exit	<input checked="" type="checkbox"/>
Labor Tech	Please, Select	Include Spouse on Invoice	<input checked="" type="checkbox"/>
Parts Tech	Please, Select	Include Tax/Fees in Estimates	<input checked="" type="checkbox"/>
Service Writer		Incl. Recommendation on RO	<input checked="" type="checkbox"/>
Default Payment Type	Most common	Update Labor Time From Total	<input checked="" type="checkbox"/>
Use Phone Mask	<input checked="" type="checkbox"/>	Don't Prompt for Tech Worksheet	<input type="checkbox"/> No
###-###-####	Don't change this	Don't show existing order dialog when starting new order	<input type="checkbox"/> No
30 Day Balance Due Warning	<input checked="" type="checkbox"/>	Check for Substitute part(s) in inventory while transferring part(s) from catalog	<input checked="" type="checkbox"/>

8b. Screen View

Screen View options	Recommended Settings
Enforce Mileage In [can be password protected]	<u>Yes</u> No
Show Odometer Out [required in some states]	<u>Yes</u> No
Starting Cursor Position on Customer Screen	Company <u>Customer</u>
Display Customer OR Company Name in WIP	Company <u>Customer</u>
Display Margin in WIP [sensitive business data]	Yes <u>No</u>
Show License at Top of Vehicle Screen (not VIN)	<u>Yes</u> No
Show Quotes in Schedule	Yes <u>No</u>
Show Estimates in Schedule* [SocialCRM = YES]	Yes <u>No</u>
Show Symptoms on New Orders [pops up list]	<u>Yes</u> No
One Start Toolbar (default is Yes)	<u>Yes</u> No
Mark All ROs As Approved/Printed	<u>Yes</u> No
Auto Scheduling Default	Never / Prompt / <u>Always</u>

8c. Phone [Setup page 21] (Changes to list sequence MUST happen before phone #s are entered)

Warning! Do **NOT** change these entries once customer phone numbers have been entered. You risk mixing up data labels as to which phone #s they belong to! [If you want Cellular in 1st position, do it BEFORE entering numbers]

Existing Entry	Preferred	Existing Entry	Preferred
Home		Service	
Office		Voicemail	
Spouse		Pager	
Cellular		Office 2	
Beeper		[blank]	

9a. Reports / Printers

Printers: (circle one) Single / Multiple / Multi-tray			Required Template?
Estimate	15 options		Chicago, FL, MI
Repair Order	9 options		WI
Invoice	21 options		FL, MI, WI
Counter Sale	4 options		n/a
Default Printer	Windows		n/a
Labels	4 options		n/a
Follow-up Letters	5 options	User defined	n/a
Tech Worksheet	5 options		n/a
Fax Printer	n/a		n/a

9b. Disclaimers [Setup book pages 4-5]

Important Note: Make sure all of disclaimers are written in accordance with local, state and federal regulations. It may also be necessary to use specific Estimate or Invoice templates to fully comply with state and local requirements.

10a. Estimate/RO & Invoice Validations [Setup page 21] leave all turned on; add as needed

10b. Category [Setup page 23] review supplied set; add as needed

10c. Location [Setup page 25] review supplied set; add as needed

10d. Symptoms [Setup page 27] Review supplied set; add as needed

10e. Program Security [Setup page 28] Review videos; decide which functions to protect.