

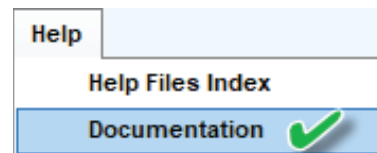
PREPARE



To ensure a successful installation of your SE shop management software, be sure to use the following tools:

1. Read the **Shop Management Software Installation Guide** included in this package prior to the actual installation.
2. Use the attached **SE Info Gathering** pages to record shop information to tailor this software to your own business.

Once you have Manager SE installed, go to **Help**, **Documentation** to view or download your SE SETUP & LEARN electronic (PDF) workbooks.



3. The **SETUP** workbook (*PDF with video links*) explains concepts and provides important recommendations towards preparing your live version of SE for actual invoicing.
4. The **LEARN** workbook (*PDF with video links*) allows new users to cycle through basic workflows (*using the DEMO version*) to become familiar with using the SE software.



SE Setup & Configuration Information Gathering

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

1.

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:		

2.

Shop Data

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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"/>

3.

Shop Data

>>

Shop / Hazmat

Shop Supplies

NOTE: Some states (CA, etc.) require itemized supplies; if so, set Shop Supplies to 0; create parts kit of 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

4. **Shop Data** >> **Shop / Hazmat** **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

5. **Shop Data** >> **Disclaimers** [Refer to SE Setup guide samples]

This is your specific business language to appear on Estimates, repair Orders, Invoices and Counter Sales. Details will typically include your policies such as warranties, storage, old parts, etc.

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

6. **Standard Tables** >> **Labor** **Labor Rates**

NOTE: Line 1 default is assigned to new customers automatically. Clicking on Type, when entering a new customer (or a new vehicle), allows an alternate selection to be made instead of using the default labor rate.

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

7. **Standard Tables** >> **Discount** (Price Levels)

NOTE: Line 1 default is assigned to new customers automatically. Clicking on Type, when entering a new customer (or a new vehicle), allows an alternate selection to be made instead of using the default pricing level.

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

8. **Standard Tables** >> **Tax Rate**

Typically, Line 1 is the tax rate to be applied for all taxable customers & vehicles.

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

9. **Standard Tables** >> **Compound Taxes**

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

Description	Rate %	GL Code
Tax #1		
Tax #2		

10. **Standard Tables** >> **Income/Payment Types**

Discuss standard set of Income Accounts with accountant (if applicable) and come to agreement on use. The Payment Types section is used to define the options that appear in the Apply Payments drop-down list.

11. **Standard Tables** >> **Standard Accounts**

Discuss standard set with accountant (if applicable); come to agreement on usage. (Defaults likely used)

12. **Standard Tables** >> **Account Classes**

Account Class assignments typically match descriptions, one-for-one.

13. [Standard Tables](#) >> [Markup](#)

Markup applied to Parts & Labor (+ Maintenance) will be applied to items when transferred back to SE screens.

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

14. [Standard Tables](#) >> [Price Markup Matrix](#)

Matrix marks up parts according to the Markup % set per \$ thresholds. Review SETUP guide for further details.

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

15. [Standard Tables](#) >> [Parts Pricing](#)

We strongly recommend using the Price setting to allow the Markup Matrix to calculate selling prices.

16a. [Configurations](#) >> [Scheduler Setup](#) >> [Scheduler Options](#)

- Click days to activate; select business hours within: [Monday](#) 8:00 AM 5:00 PM
- Import standard holidays and/or create additional events by date or pattern: [Holidays...](#)
- Select **Hours Visible** on Schedule (usually a little longer than business hours) and # of 'Show last' days.
- Select a default **Drop Off time** (choose typical; can always be changed at the appointment editor level).

16b. [Configurations](#) >> [Scheduler Setup](#) >> [Add / Edit Schedule States](#)

Customize Appointment State colors and/or add your own states: State Color 132, 255, 175

16c. [Configurations](#) >> [Scheduler Setup](#) >> [Add / Edit Schedule Resources](#)

Add any Resources to be visible for assignment during appointments.

17.

Configurations

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Technicians Setup

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ServiceWriter



These entries are created to appear in the 'Written By' drop-down selection list:

Service Writer Name #1:		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 Name #2:		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 Name #3:		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 ALSO appear on the labor/parts technician lists, to be selected to be assigned to work.

18.

Configurations



Technicians Setup



Technician



These entries are created to appear in the 'Technician' drop-down selection list:

Technician Name #1:		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 Name #2:		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 Name #3:		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 Name #4:		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: %	
<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	

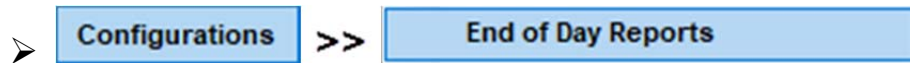
Technician Name #5:		Last:	First:
Address:			
Zip Code:	City:		State:
Phone 1:	Phone 2:		
Email address:		Birthday: __/__/__	
Notes:			
Wage Info:	Hourly or Salary? <i>Circle one</i>		Rate:
Pay Period Hours: 40 or 80? <i>Circle one</i>		Commissions (below)	
Parts: %	Labor: %	Sublet: %	
<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	<i>Profit, Sale or None</i>	

19. **Configurations** >> **Reports/Printers**

You may assign a single printer to all business phases or assign different printers or printer trays to each phase.
TIP: having a dedicated printer for tech worksheets closer to the technicians could save time and footsteps.

Printers: Single / Multiple / Multi-tray?	Printer Assignment	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	n/a
Tech Worksheet	5 options	n/a
Fax Printer	n/a	n/a

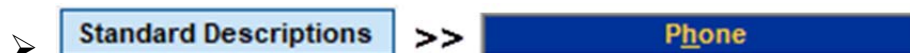
Selected Items from Self-Setup portion to also consider for Settings input decisions:



Select various reports (tagging) to be run daily as a single batch printing routine (instead of each, one at a time).



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* [read SETUP guide]	Yes No [read SETUP guide recommendations]
Show RO in Schedule*	Yes No [read SETUP guide recommendations]
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>



Warning! Do NOT change these entries once customer phone #s have been entered. You risk mixing up data as to which phone #s these belong to. [If you want Cellular to appear 1st, change this BEFORE entering phone #s]

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

Final Steps: Better Prepared SE Launch

Make sure to review your shop settings and enter as much re-usable data as possible now to make your startup experience that much faster and smoother!