

Report Pro: Customizing Multi Point Inspections

Article Number: 623 | Rating: Unrated | Last Updated: Thu, Jun 19, 2014 at 8:15 AM

REPORT PRO Customize Multi Point Inspection What Should Be Done Before Customizing

1. Make a list of categories that represent the service lines that you wish to dynamically track against your shop management invoice line items

1.1. Typically these are recurring maintenance services such as Oil Change, Trans Service, Coolant Service, Front Brake Service, Rear Brake Service, Tire Rotation, Air Filter etc... 1.2. As a general guideline, there should be AT LEAST one category for each separate service you wish to track dynamically. You can have more but not less. 2. Compare your list of categories with the list of categories already present in your shop management system

2.1. Missing Categories should be created in your shop management system 2.2. Any category that applies to more than one service should be edited to represent only a single service. [Hint] Make note of those categories for help when using Category Tools

Definitions Shop Management Category - The category in your shop management system that applies to Parts, Labor, Sublet line items on your invoices

Group - Allows for grouping line items on the M.P. Inspection report into sections. Groups and their associated line items are alpha sorted so if you have an order preference, place numbers at the beginning of the group and/or line descriptions

Description - The description of the inspection line item as it will display and print on the report. Keep them short and descriptive to allow for more lines on a single page

Months Due Back - Maximum number of months that should elapse before the inspection/service needs to be performed

Miles Due Back - Maximum number of miles that should elapse before the inspection/service needs to be performed

Report Title - This is for what you want to name your multi point inspection and is the first line after the header

Disclaimer - If you feel the need to include a disclaimer indicating that the line items represent an inspection guideline only and not

necessarily actual work performed, it will print in the notes box located at the bottom right side of the report

Adjust Your Interval Ranges - This is a slider bar that allows you to adjust the thresholds at which the font colors change based on the service category performed. This is driven by amount of time or miles left on the service

Service Never Performed - This color represents service categories that have never been performed

Service Past Due - This color represents service categories that have been performed and the minimum threshold for time or mileage left on the service exists

Service Due Soon - This color represents service categories that have been performed and fall between the minimum and maximum thresholds for time and mileage

Service Recently Performed - This color represents service categories that have been performed and the maximum threshold for time and mileage still exist

Service No Category - This color represents inspection lines that are not linked to a category, typically used for the courtesy checks

Report Theme Color - This is the color used to highlight the group labels and the menu

Hints #1: If a service is only tracked on a months due back basis, enter 0 for the Miles Due Back #2: If an inspection happens every time a vehicle is in and does not have a corresponding line item on an invoice, select <No Category> from the Shop Management Category drop-down #3: Selecting the Reset button to reset the M.P. Inspection defaults cannot be undone #4: Set your Report Theme Color to match the main color of your logo to help with Brand Recognition

Customize M.P. Inspection Line Items and Layout

1. Select the Customize tab 2. Select the Customize M.P. Inspection button 3. Multi Point Inspection includes 5 groups and 28 inspection line items as a quick start. These default lines can be edited or deleted to match your needs. If you do not see these defaults or wish to reset them, select the Reset button 4. Select a line you wish to edit. The selected line will be highlighted 5. Select the Edit button 6. Select the Shop Management Category that you would like to link the selected line item to. Line items set to that category in your shop management system will track against that inspection line description 7. Select the Group that represents the section of the report that the Description line will display in. To create a new Group, just type the name of the Group label in the box

Customize M.P. Inspection Layout & Intervals

1. Select the Customize tab 2. Select the Customize M.P. Inspection button 3. Select the Layout & Intervals tab 4. Give your report a title 5. Add a disclaimer if you prefer 6. Click and Drag the left slider to set your minimum threshold for time or mileage left on the service 7. Click and Drag the right slider to set your maximum threshold for time and

mileage left on the service. 8. Using the Select Color button for each interval threshold, set the color you prefer for the text to print when a service is performed. RELATED: Click here to see how to re-categorize history invoice line items: <http://www.mitchell1.com/knowledgebase/article.php?id=624>

Posted by: [Tim McDonnell](#) - Tue, Jan 15, 2013 at 7:00 PM. This article has been viewed 55101 times.

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