

## Installing Revisions report

Objective: adding custom report to shop mgmt software for calling customers having vehicle Recommendations on file that are marked as printed (with Followup Date)

NOTE: Instructions presume Manager Plus SU single user; modify paths accordingly.

Files Required: RevisionsToSell.rpt

User Requirements:

- Must be able to copy rpt file to appropriate directory (folder)
- Must be able to edit text in reports.inf file to create title access in reports menu

**NOTE:** Please DO NOT call M1 tech support for assistance on this specific report as it is not currently part of the Manager shop mgmt software release at this time.

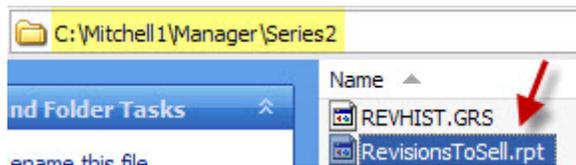
1. Right-click on the **RevisionsToSell.rpt** attachment and select **Save As**; save it on your desktop or other obvious place so that you may find at appropriate time.

**NOTE:** It is sound practice to keep a copy of this file "in a safe place" in case it needs to be re-installed at a later date.

2. Close shop mgmt software and do a BACKUP in the process.

3. Right-click on **RevisionsToSell.rpt** file and select **Copy**. [**Edit, Copy** or **Ctrl +C**]

4. Go to My Computer and navigate as shown below:

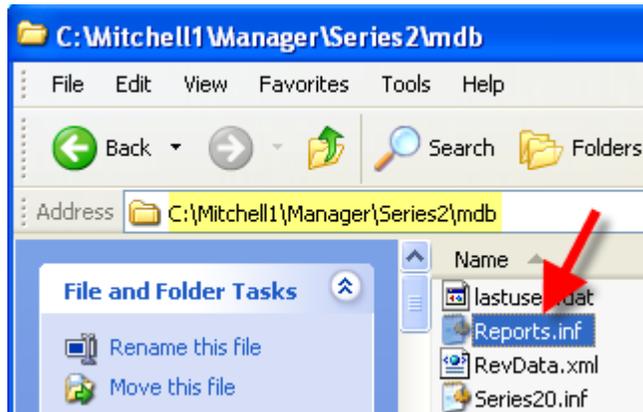


5. Click in the white space where Program files are listed and then select **Edit** menu, **Paste** [or **Ctrl + V**] to place the CustNonTax.rpt file into the file list as seen above.

The file is now placed where it belongs; the next step is to edit the reports.inf file to add a new entry so that it may be selected by users from the Reports – Client tab.

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6. Go to My Computer and navigate to the location shown below:



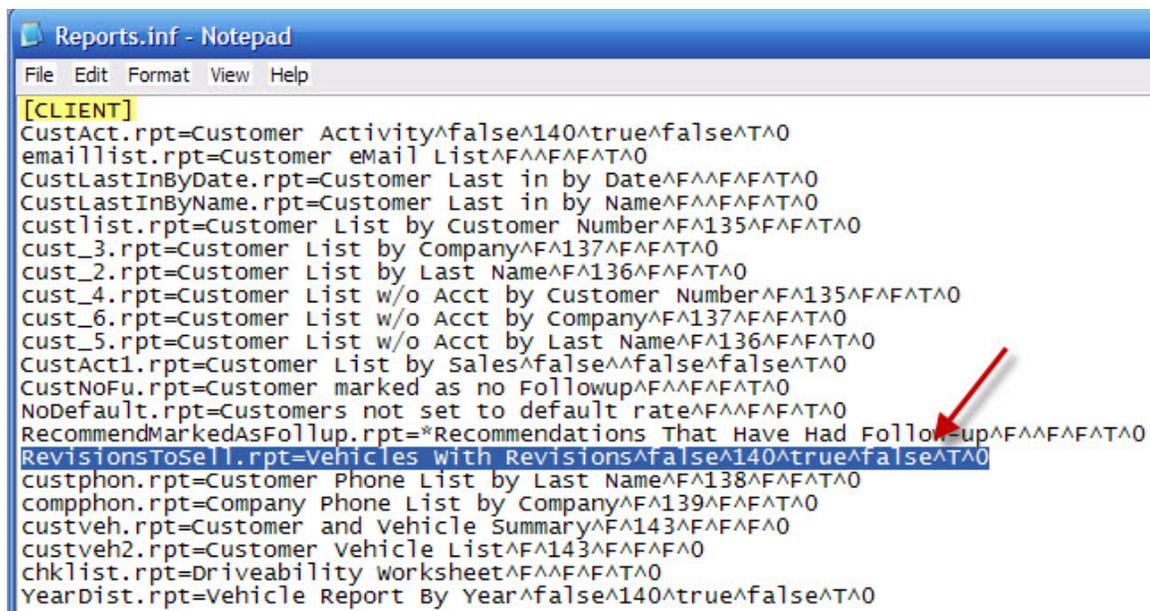
7. Double-click on the **Reports.inf** file and it should open in Notepad for editing. You'll first see ACCOUNTING (tab); scroll until you see **CLIENT** (tab)

The exact text that needs to be added to the reports.inf file is shown below;

**RevisionsToSell.rpt=Vehicles With Revisions^false^140^true^false^T^0**

8. Copy the (**bold**) text above.

9. Paste the text into the (approximate) position seen below:



10. Click on **File, Save** to record this addition and then close the Reports.inf file.

Now re-start the shop mgmt software and go to the Reports – Client tab to try out your new customer report option.