



Mitchell1[®]

In your shop, at your side

20
YEARS

SHOP MANAGEMENT
EXCELLENCE

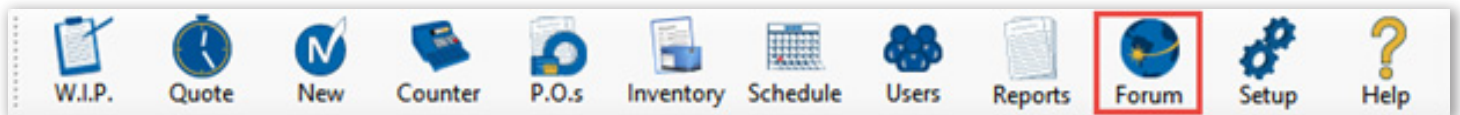
TOP 20 TIPS FOR MANAGER SE

Celebrating 20 Years of Innovation

The Mitchell shop management solution started as **Series I** on September 21, 1995. Our offerings were bolstered by **Series II** during 1997, providing our first product to also include inventory and purchase orders. Since then, the product has evolved through generations of technology and numerous feature enhancements, all leading up to today's **Manager SE**, the industry standard for auto repair shop management.

As part of Manager's 20th anniversary celebration, we reviewed literally hundreds of ideas and then selected 20 great user tips to share with all Manager SE users. We didn't come up with all of these tips by ourselves; shops that are using this software every day were willing to share their experience and new ideas that make their workday better for all concerned.

These tips have been shared by shop folk just like you who are participating in the Manager Forum, an interactive community of Mitchell 1 Manager users. You can easily meet them and compare notes simply by clicking on the Forum button in the toolbar of your Manager SE program (see below). Even if you're away from Manager SE, you can still be connected to this community on the Internet at www.managerforum.net, and gain valuable insights from content shared by your peers. Take a moment to open the Forum and check out what you've been missing!



LIST OF TIPS

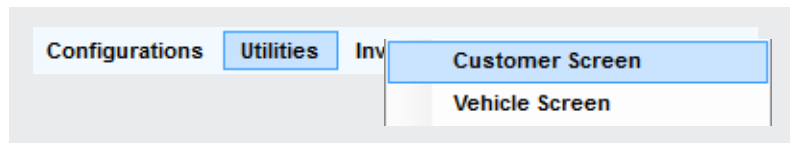
Tip #

1. What to Do With a Vehicle that a Customer No Longer Owns
2. How to Handle Discount for Payment Received
3. How Do I Cap a Promotional Discount?
4. How Can I “Tag” Specific Customer Records?
5. How to Tell a Customer When Specific Maintenance Items are Due for Service
6. How to Apply and Track Battery Recycling Fees
7. Handling Too Many Quotes on Our Work-In-Progress Screen
8. Quest for the Best LOF (oil change) Setup in Manager SE
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10. Entering Customer’s Previous Vehicle History Performed Elsewhere
11. Create a “Customer Type” Grouping That Pays Prices with No Markup
12. Using Source to Track Outside Sales Activity
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14. How to Get a Detailed Report of ALL Sales for a Specific Part Number
15. Multiple Ways to Use the Alternate Part Feature (PART 1)
15. Using Alternate Part Function to Create Part Lists (PART 2)
16. How to Un-Sell a Revision When Customer Changes Their Mind
17. Need to Have Tire Pressure Appear on Every Invoice
18. Vehicle Coming in from Another Shop; VIN Already in My System
19. How and Where to Add New Referral Types to the Referral List
20. Use the Special Order Function in Certain Situations

WHAT TO DO WITH A VEHICLE THAT A CUSTOMER NO LONGER OWNS

Q “I use Excel and MS Query to create custom mailing lists; works great. The problem is some customers have had 10+ cars over the years and these could have the same last-in date and address. I can de-dupe the list down to one address per customer with software, but that also removes any other active cars the customer brings here. I’d like to purge cars that have not been here for a long while. Any ideas? Thanks.”

A “We made up a separate account called ‘Sold Vehicles.’ If we know that the customer sold, junked or totalled a vehicle, we move it to this file. It helps to clean up customer accounts. Sometimes people get emails about vehicles they got rid of, so this helps with that situation. When moving it to ‘Sold Vehicles’ we do a few things: in Vehicle Memo we enter customer’s name; we delete the license plate & copy any Recommendations into the Vehicle Memo (so they don’t show on future follow-up reports); then we delete the inspection date or move it to the memo (for same reason). Hope this helps.” [To reduce errors, Change Ownership is only visible in the 3 tab file maintenance view]



The screenshot shows the Mitchell 1 TeamWorks SE interface. The main window displays vehicle details for a 2004 Acura TL. The 'Vehicle' tab is active, showing fields for License, VIN, Year/Make, Model, Body Style, Engine/Fuel, and Transmission. A 'Change Ownership' button is highlighted in the bottom right corner. A 'Customer List' dialog box is open, showing a list of customers with 'Vehicles, Sold' selected. A 'Manager SE' dialog box is also open, asking to change ownership from 'Harkins' to 'Vehicles'.

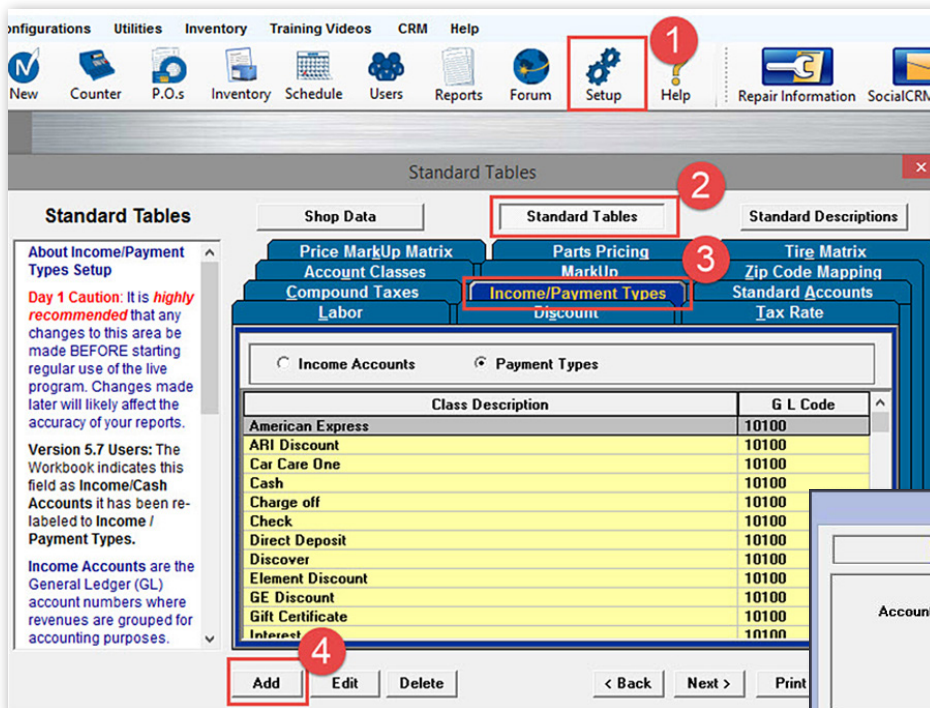
Date	Need by	Description
08/21/2015	08/21/2015	Your vehicle requires

HOW TO HANDLE DISCOUNT FOR PAYMENT RECEIVED

Tip “We do a lot of fleet maintenance. We bill customers bi-weekly and some can have as many as 40 invoices. We offer them a 2% discount if the amount is paid in 15 days. Sometimes they do, sometimes they don’t. Is there a better way to apply a discount to a batch other than un-posting every invoice, applying them and re-posting? I have been just applying the payments with the discounts and it leaves a balance of the 2% on their account. Can I apply a credit to them? It is preventing me from printing statements as it keeps showing the invoices with past due balances.”

“What I would do is create a payment type called 2%net15. Then I would apply their check towards the appropriate invoices in Batch Payment. That will leave a balance on the last invoice that should equal 2% of the total payment. Then pay the remaining 2% with the discount payment type. Now everything is nice and clean and you can send statements that are accurate.”

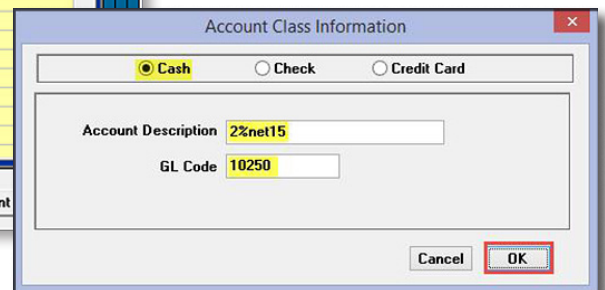
NOTE: Subtract this “2%” from your daily cash as it’s not collected and basically being written off.



To add the payment type to the drop list in the Payments window (shown below):

- 1 Setup
- 2 Standard Tables
- 3 Income/Payment Types
- 4 Add

A unique GL Code # breaks it out on reports.



HOW DO I CAP A PROMOTIONAL DISCOUNT?

Q “AAA requires me to give their members a 5% discount on every invoice with a cap at \$50.00. I hate to say this, but I don’t need employees trying to do extra math (it’s never in my favor). How do I set a cap on these discounts? There must be other shops with this issue, so please let me know what it is. Thanks.”

A “One simple idea to use today is to simply use two different discounts with similar (‘AAA’) descriptions:

- 1** Discount By Percentage (AAA5 - use it to calculate a % discount up to \$50)
- 2** Discount By \$ (AAA50 - apply that flat amount when discount would be \$50 or greater)

The screenshot shows the 'Packages & Discounts' window with the 'Discounts' tab selected. The table below is visible:

Number	Description	Amount	Expires
AAA5	AAA 5% Discount	Percent	09/01/2020
AAA50	AAA 5% Discount 50.00 max	50.00	09/01/2020

The screenshot shows the 'Add Discount Coupons' dialog box for creating a 'Percent Off' coupon. The fields are filled as follows:

- Coupon #: AAA5
- Description: AAA 5% Discount
- Start Date: 09/01/2015
- End Date: 09/01/2020
- Parts - Percent Off: 5.00
- Labor - Percent Off: 5.00

The screenshot shows the 'Add Discount Coupons' dialog box for creating a 'Dollar Off' coupon. The fields are filled as follows:

- Coupon #: AAA50
- Description: AAA 5% Discount 50.00 max
- Start Date: 09/01/2015
- End Date: 09/01/2020
- Parts - Dollar Off: 25.00
- Labor - Dollar Off: 25.00

HOW CAN I “TAG” SPECIFIC CUSTOMER RECORDS?

Tip “So I’ve been trying to find a way to ‘tag’ certain customers and then later find those ‘tagged’ records. For example, a family comes in and says they need a car. Open up their Customer screen and click in the Membership # field. Enter ‘needs car’ (something easy to remember) and save it. Now flash forward a few weeks. Another customer comes in, ‘Hey I’m selling this car, if you know anyone looking?’ Press F6 (NEW), enter ‘needs car’ (or whatever) into the Membership # field and BAM! There’s a list of the customers that you tagged with that phrase in the Membership # field. Now maybe you can call the person looking for a car and hook them up.”

Customer

Company: _____
 Name: Mr. _____
 Last, First: Lewis John
 Spouse: _____
 Address: 1137 Kealy
 Zip, City, State: 92131 Spring Valley CA
 Home: 619-219-1270 Telephone List
 Office: 619-____-____

Customer Snapshot
 Lifetime \$ Spent: 268.58
 Lifetime Invoices: 1
 Invoice \$ Avg: 268.58
 Avg Yearly Visits: 0.00
 Last Visit Date: 3/7/2005
 Include in CRM Campaign

Payment Status
 Cust #: 187
 Charged Bal.: 29.59
 Credit Bal.: 0.00
 Sales YTD: 0.00
 Charge Status: NA
 Credit: Over 90
 Late Fees: Apply

Membership # **need car**

Save Changes to Customer Information?
 Yes No

Customer List for Start Order

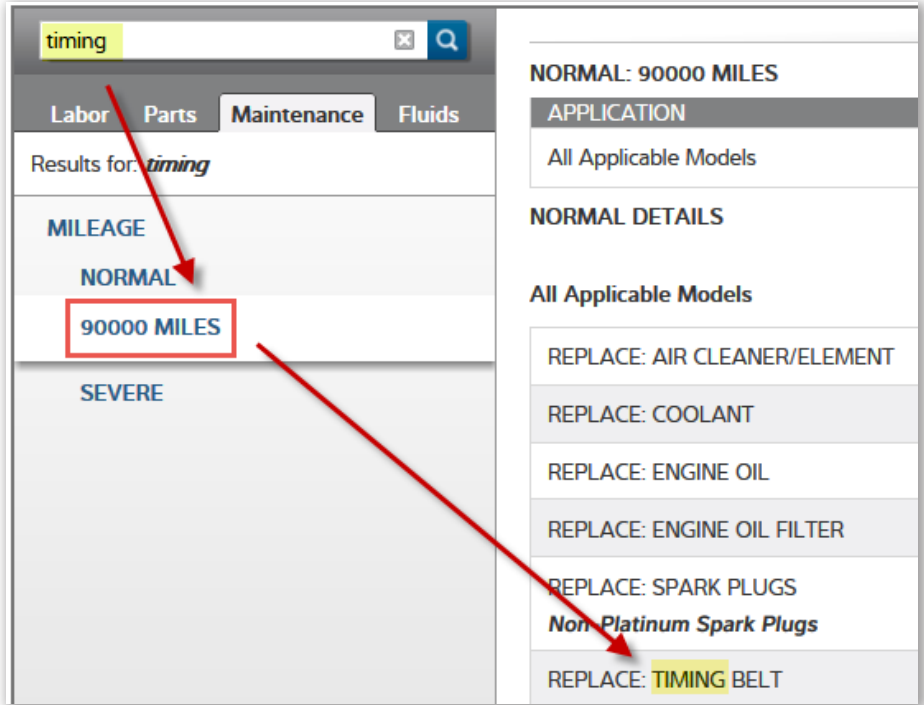
Name	First Name	Phone Number	Membership #	Address	City	State	Zip	Licenses
	Mary	619-393-9602	need car	146 Tennyson	Santee	CA	93133	LPY-791
	John	619-____-____	need car	1137 Kealy	Spring Valley	CA	92131	MP4-70
	Brandon	619-____-____	need car	146 Tennyson Pl.	Riverside	CA	93412	

Answer YES to save the Membership # field input.

HOW TO TELL A CUSTOMER WHEN SPECIFIC MAINTENANCE ITEMS ARE DUE FOR SERVICE

Q “When a customer asks, or we need to find out, when a particular service is recommended on a vehicle, currently we must check several of the individual interval lists to find when something is due. If it is not when we expect it, it can be easy to miss. Since the information is already there, it would be a great help if we could find a shortcut to enter, i.e. spark plugs, to see when service or replacement is recommended.”

A “All we do is type in ‘timing’, ‘cabin’, ‘spark’, ‘transmission’, etc. in the Maintenance Search field and it pulls up all the mileage intervals where these items are recommended to be serviced or replaced. It works great.”



HOW TO APPLY AND TRACK BATTERY RECYCLING FEES

Q “How are you applying and tracking the state recycle fee associated with selling a battery? Are you using the Fee button inside the actual part record? Are you using a separate GL code? Which report are you using to track how many per month are being collected?”

A “I (in Florida) generated a separate part called State Battery Fee. Then I assigned it a unique GL code. It synchs to Quick Books and when the payment is due, I can pull it up and mail it off. Not sure if that is the right way, works for me.”

A “You can either attach the fee part you create to your batteries, or set up a Parts Kit with your stocked batteries to automatically add the fee. Keep it alone in its own Account with a unique GL (General Ledger) code; then the Revenue by GL Code report will make this very easy for you to break out monthly.”

The screenshot shows a software menu with several categories: Price Markup Matrix, Account Classes, Compound Taxes, Labor, Parts Pricing, MarkUp, Income/Payment Types, Discount, Tire Matrix, Zip Code Mapping, Standard Accounts, and Tax Rate. The 'Income/Payment Types' category is expanded, and 'Income Accounts' is selected. Below this, a table lists various class descriptions and their corresponding GL codes.

Class Description	GL Code
Parts Revenue Non-Taxable	40510
Reimbursement	50011
Shop Supplies Revenue	40800
State Battery Fee	40560
State Inspection Sales	47101
Storage Fees	47201
Sublet Revenue	40300
Tire Disposal Fee	40520
Tire Tax	40510
Towing	40800
Warranty	50000

Revenue By GL Code

Report Date: 09/17/2015

GL Code	Class Description	Revenue in Dollars
000000	Unassigned	99.26
000000	Tax - Main Tax	150.52
	Tire Purchase	0.00
	Shop Revenue	825.80
	Shop Revenue Non-Taxable	273.95
	Shop - Discounted	0.00
	Sublet Revenue	56.25
	Parts Revenue	2,416.18
	Parts Revenue Non-Taxable	0.00
40510	Tire Tax	0.00
40515	Parts - Discounted	-1.80
40520	Tire Disposal Fee	0.00
40560	State Battery Fee	8.00
40666	NSF Fee	0.00
40710	Core Revenue	0.00
40750	Cust Deductible	0.00
40800	Shop Supplies Revenue	363.81

The 'Account Class Information' dialog box shows a table with two columns: 'Account Descriptions' and 'GL Codes'. The 'Income' category is selected, and 'State Battery Fee' is entered in the 'Account Descriptions' field, with '40560' entered in the 'GL Codes' field.

Account Descriptions	GL Codes
Income State Battery Fee	40560

HANDLING TOO MANY QUOTES ON OUR WORK-IN-PROGRESS SCREEN

Q “We simply give out too many Quotes to customers. I am inquiring if there is any place in Manager to store these so they are not on my screen and in my face all day long. I usually wait for about a week, then print it, file it and delete it, but it would be nice to be able to just push it to another area just in case that customer comes in soon after that.”

A “The best practice is to collect as much information as you can and create a Revision for the customer. If you can at least get the name, phone and vehicle basics, you then create a Revision that has the advantages of

- A) being out of view
- B) pop-up reminders when they come back to have work done
- C) date stamping so you know if the quote pricing in Revisions is recent or old
- D) allows you to follow up with the customer during slow times (tie a recommendation to it)

I know this takes time and may seem difficult during busy times, but in the long run I think you’ll find it worth it.”

A “When a person comes in asking us to estimate their request, we create an Estimate. Once it's made, we ask for an appointment. Yes = estimate stays and a time/date are added for the Scheduler. No = estimate data is moved to a revision and estimate is deleted. Simple! The only Estimates on my WIP are scheduled appointments. The only RO's on my WIP are jobs in progress. The only Invoices on my WIP are completed jobs that have not been paid for or not yet delivered. When a customer comes in, we go to the schedule and open the estimate there. At this time it is converted to an RO and becomes visible on WIP. All RO's on WIP are vehicles being worked on and all INV's are completed work. When the invoice is paid and posted it goes off the radar.”

The screenshot shows the Mitchell 1 TeamWorks SE interface. A red box highlights the 'Edit' menu, with a red arrow pointing to the 'Copy' option. Below the menu, a table of quote items is shown with a red box around the first three rows. A second table, representing a revision, is shown below with a red box around its first three rows. A red arrow points from the 'Copy' menu option to the first row of the revision table.

Time	Rate	Description	Qty	Extended	Sale
1.00	\$88.00	Diagnose air conditioning system		\$69.95	\$69.95
1.00	\$88.00	A/C Recharge & Leak Test System		\$88.00	\$88.00
		Freon	1.00	\$30.00	\$30.00
		towing	1.00	\$92.50	\$92.50
0.00			0.00	\$0.00	\$0.00

Time	Rate	Description	Qty	Extended	Sale	List
1.00	\$88.00	Diagnose air conditioning system		\$69.95	\$69.95	
1.00	\$88.00	A/C Recharge & Leak Test System		\$88.00	\$88.00	
		Freon	1.00	\$30.00	\$30.00	\$0.00
0.00			0.00	\$0.00	\$0.00	\$0.00

Use Edit menu or keyboard shortcuts:

File Edit Copy Ctrl-C Paste Ctrl-V

QUEST FOR THE BEST LOF (OIL CHANGE) SETUP IN MANAGER SE

Q “Just about every other car that comes in takes more than five quarts. How do you all have your canned jobs or LOF packages set up? We’ve never used the LOF package (no real reason, just never have). How do you account for the cars with five quarts or less so that inventory is accurate? This is a battle I’ve been dealing with for a long time, and I ignore it for a while and then come back to it. It’s always nice to have new input from this Forum, so thank you for all your help.”

A “We have a canned job for the type of oil change required using 5 quarts as the starting point. Those canned jobs have a set price based on 5 quarts and are broken down by oil type or spec requirement. For instance, I have a VW 502 spec canned job with 2 different weights. I have a 5w20 and 5w30 jobs, etc. Then we go to Manager and get the quantity. Once we know all this detail, we create a specific job in Revision #9 for that customer/vehicle, based off the generic canned ones. If you have more than 5, you pay more. If you have less than 5, you pay less. There’s just too many types of oil, specs and quantities out there to use packages or one set price. Frankly, the plain old oil change is a thing of the past. I’ve been working hard to get out of that and working toward maintenance intervals. You can charge what you’re worth and there’s more benefit to the customer. The quickie chains are just beating this as a commodity to the consumer. In fact, the chain down the street is doing them for \$10.99!”

A “I have two canned jobs, LOF4 and LOF5. I click on those and it then brings up all of the oils we have in stock. I select the proper oil and add to RO. I then look up the filter. ANY time a customer gets a new vehicle I add the LOF details to Revision #9. I know guys will have things like VWGS540/5 and I guess that makes sense if you remember that code. My pea-sized brain has no room for that. I rely on Revision # 9 for about 90%. This also makes it very easy when a customer calls, asking me to change the oil. I open the RO and look at that Revision #9 and I know what we use. In Revision #9 I also include in caps (if needed) “WE DO NOT STOCK THIS OIL/FILTER” as a reminder to myself, to order this stuff.”

Use Edit menu or keyboard shortcuts:

File Edit Copy Ctrl-C Paste Ctrl-V

Customer Vehicle Order **Revision** History Approved RO # 146848

Parts Labor Notes Sublet Symptom Jobs PartKits Promos Estimator Maint. Fluids TSBs

Written By Dwulet, John SubEst 9 Created: 09/17/2015 6:57AM

Total Hrs: 0.20

Time	Rate	Description	Qty	Extended	Sale	List	Price	Part No.	MfgCode	Tech Name
0.20	\$88.00	Lube, Oil & Filter LABOR		\$6.50	\$6.50					Please , Select
		Oil Filter - Fram	1.00	\$4.22	\$4.22	\$0.00	\$4.22	ph8a		Please , Select
		Eng Oil - 10w30 Castrol	5.00	\$19.25	\$3.85	\$0.00	\$3.85	10w30c		Please , Select
0.00			0.00	\$0.00	\$0.00	\$0.00	\$0.00			<None>

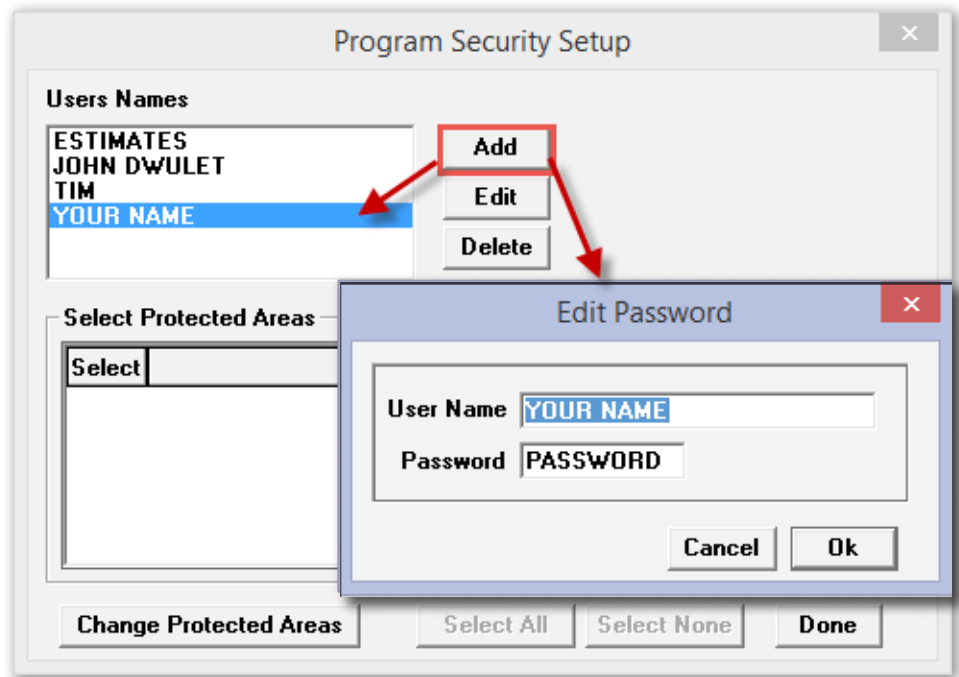
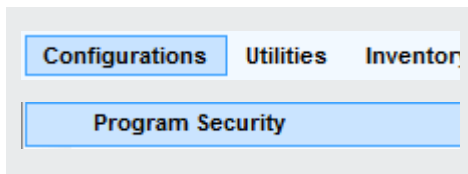
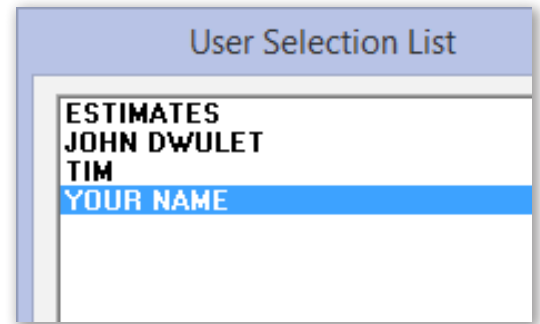
NOTE: Don't use the Sell Revision feature for an oil change!
To keep the details in Sub-Est9, copy & paste it to Order.

KEEPING THE WORK-IN-PROGRESS SCREEN SORTING SEQUENCE

Q "I like to have my invoice sorted by date. I noticed each time I close Manager and reopen it does not save my settings as far as how I have them set up and must re-sort and change my columns. Is there a way to save these settings?"

A "Usually when your screen settings don't stick, it's because you haven't set up at least one User profile yet to save these preferences to. It probably says 'Default User' down at the bottom RH corner?"

"Thank you for the reply. Yes, once I got the Users set up it saved my screen sorting preferences."



ENTERING CUSTOMER'S PREVIOUS VEHICLE HISTORY PERFORMED ELSEWHERE

Q “We have a new customer who has kept good records on all of the work that has been performed on his vehicle. Is there a way we can input this history into his new Mitchell 1 account that we have set up for him? This way we can track information like when his timing belt was last replaced, etc. Thanks.”

A “You can’t enter work you didn’t do. Use a Revision; list relevant items, dates & mileage. Delete them when obsolete.”



A “Another option if you’re just trying to track certain services is to use Recommendations. You can enter estimated due dates for those important services based on when they were done last. That way you have a visual reminder every time you open an order for that customer, AND an opportunity to send them a reminder if you are utilizing that component.”

Recommendations		
Date	Need by	Description
09/17/2015	11/14/2015	Transmission service due (estimated - prev
09/17/2015	10/30/2015	105K service due (estimated - previous sho

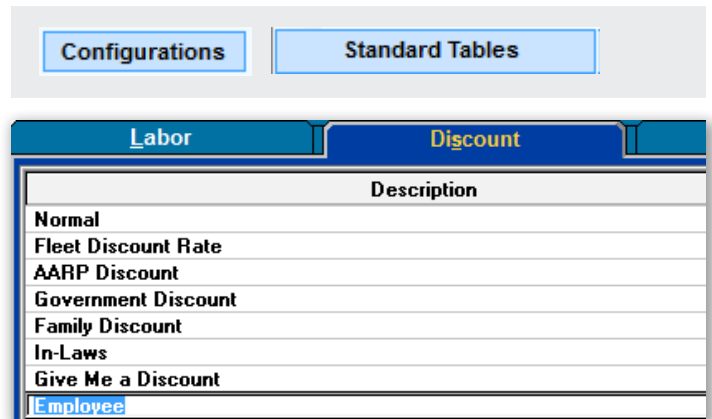
A “What we do when we have a customer give us history is to put that information in the Memo area on the Vehicle tab page. This memo area can hold a lot of information. When we do vehicle inspections, we put information in the Memo too, that we do not want to put in the Recommendations area (rear disc brakes, timing belt & transmission filter, etc.). This way all of the history & other info can be printed on Tech sheets so the techs & office staff can see it quickly.”



CREATE A “CUSTOMER TYPE” GROUPING THAT PAYS PRICES WITH NO MARKUP

Q “I’d like to be able to assign certain customers that do not pay a parts markup; this is specifically aimed at employees, family, etc. that I sell parts to at my cost. I’d like that to pop up automatically when I open an RO with their name, instead of having to manually go down the parts list and change markup on each part. Is there a way to do that? I bet there’s a way to do something like this, but I’m not coming up with it poking around in setup menus.”

A “You will not be able to set up selling at cost automatically per individual. However, you can assign ‘Parts Discount’ (price level) for certain customers: Go to Configurations -> Standard Tables -> Discount and place a discount percentage on any but the first line. Go to the Customer tab you want to apply this parts discount to. Click TYPE at bottom of screen and put a check mark next to the appropriate discount for Parts type. You want to make sure that for every vehicle for that customer, that the parts discount is set accordingly.”

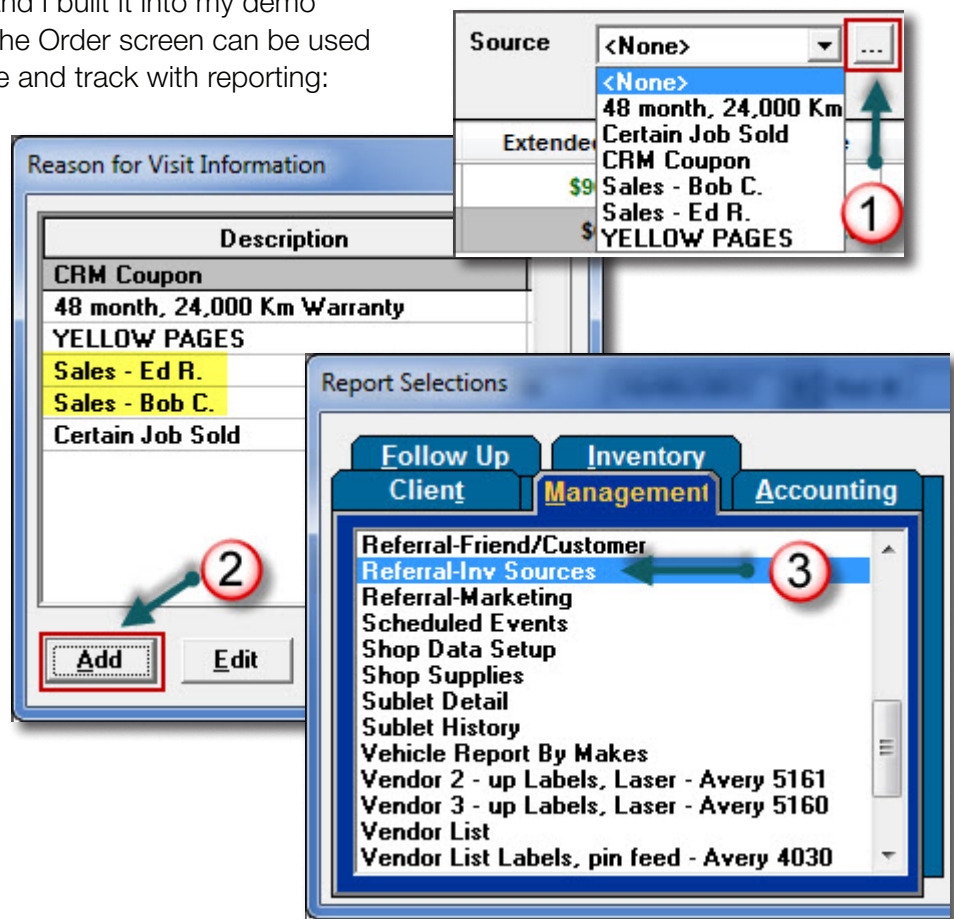


“That does what I need it to do. Thanks!”

USING SOURCE TO TRACK OUTSIDE SALES ACTIVITY

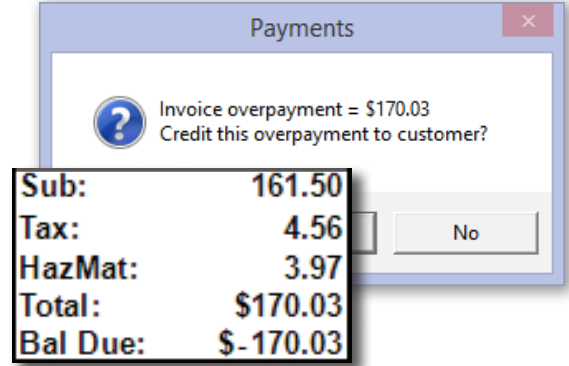
Q “Has anyone found a good way to track commissions on outside sales? We are looking to be able to track our outside sales person’s accounts they bring in and pay them on a percentage of profit from their accounts. So, in a nutshell we need to be able to track their accounts and track their commission (percent of profit for parts and labor) weekly. Our service writers and techs are also set up for commissions (though small to keep them honest), so setting them up as a tech or service writer won’t work for us and using the referral report we would have to go back and pull reports for each invoice. Any help or suggestions would be much appreciated.”

A “Somebody asked this before and I built it into my demo database. The Source field on the Order screen can be used to code invoices to sales people and track with reporting:

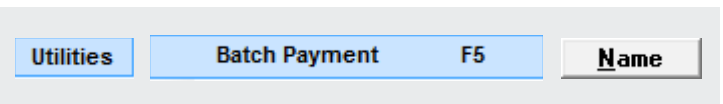
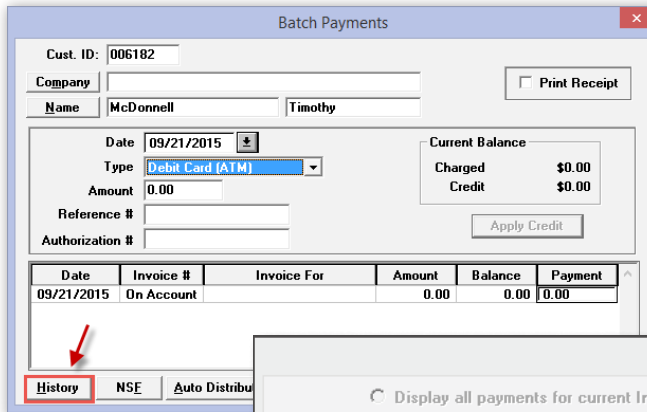


HOW TO CORRECT ANY CUSTOMER PAYMENTS THAT WERE MADE IN ERROR

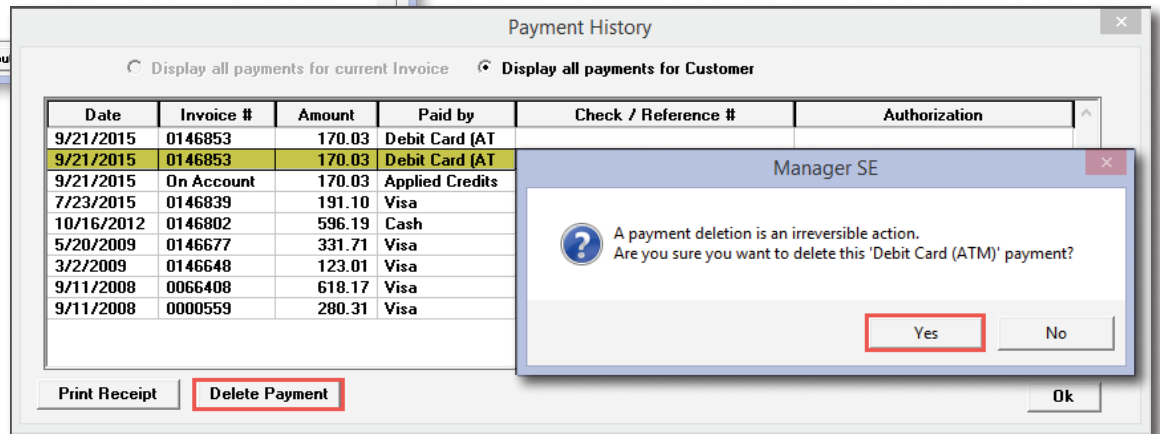
Q “Not sure what happened here, but I got out of sequence when posting a payment. I realized I had forgotten to print the invoice PRIOR to accepting payment (company procedure). So I canceled the payment (I thought) and then printed the pre-payment invoice. Then I must’ve selected ‘Option – Apply Payments’ as I had to type in the payment amount. It then asked if I wanted to ‘credit the overpayment to customer?’ I was confused so selected No. The printout then said ‘Balance due -\$170.03’ as in NEGATIVE \$170.03, as if I owed HIM money. What can I do to fix this?”



A It can sometimes be difficult to figure out the sequence of events without being there to see it. Somehow the payment was unknowingly applied twice and the extra instance should be deleted. Look up this customer with Utilities - Batch Payment (F5 key); then click Name (Company) to use the customer list to select them by name.



Click on History and look at the recorded payments. Highlight the duplicate entry and then click on Delete Payment; answer Yes to confirm this deletion. This will put everything into place and cure the confusion!

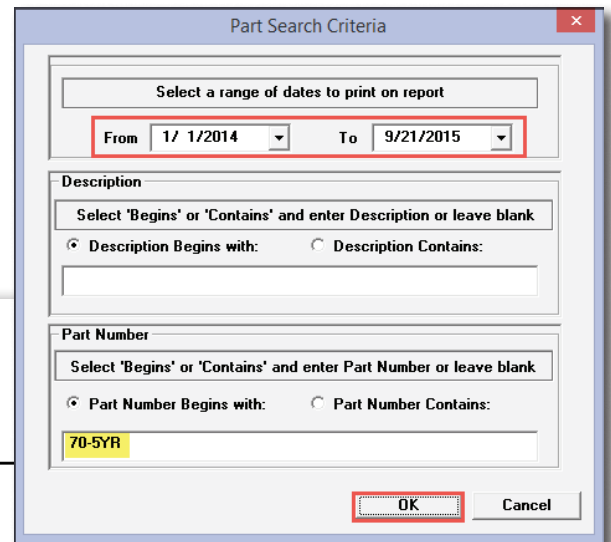


HOW TO GET A DETAILED REPORT OF ALL SALES FOR A SPECIFIC PART NUMBER

Q “I was wondering if I know a part number, but not whose vehicles I installed it in, is there a way I can just type in the part number and/or description and it will find that part? I am looking to find the names and invoice details.”

A “Go to Reports – Management tab; select Part Number Search. Set a date range and enter full or partial part number. Then click OK to run report; displays all sales of that part # with customer name, vehicle, invoice #, date, etc.”

“I just tried this...very nice; I will definitely be using this. It's always nice to learn something new!”



Forward Thinking Automotive
1115 Main St
Poway, CA 90210
Phone - 858-391-5000 Fax - 858-555-1312

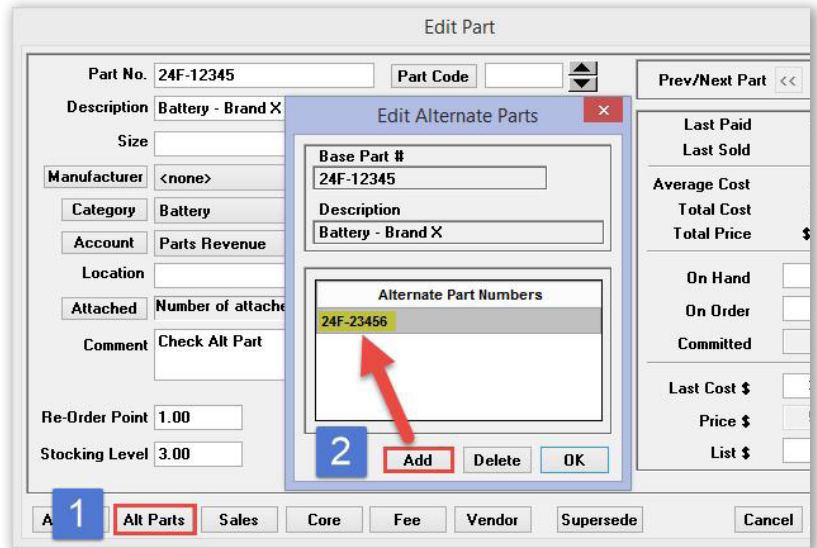
Search By Part Number & Description Report

Search Criteria > **Part Number Begins With: 70-5YR**
Period From: 1/1/2014 To: 9/22/2015

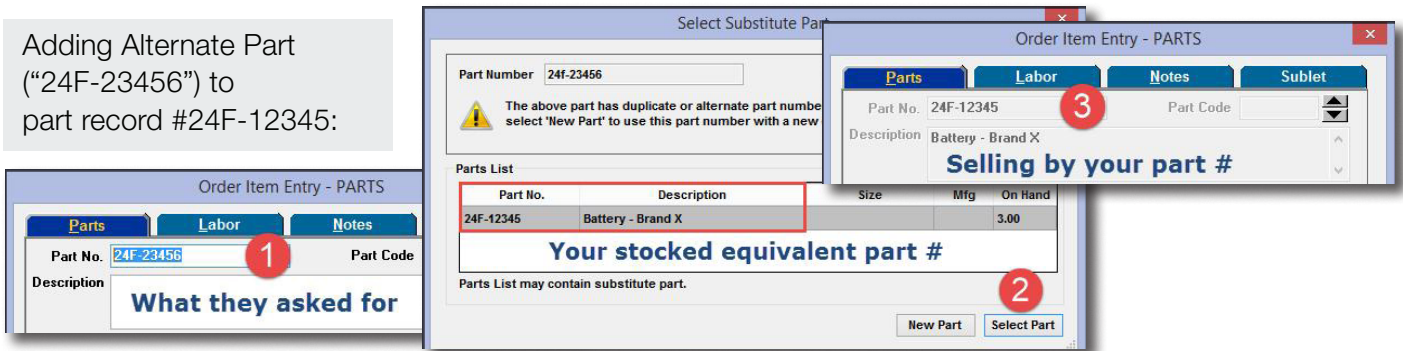
Description:Battery	Part Number: 70-5YR	Qty: 1.00	Cost: 43.60	Sell: 87.20
Vehicle: 1994 Nissan Pickup Customer: Vancardo, Rick Date: 9/17/2015	Engine: 146849 Mfg:			Trans: Interstate Battery Vendor Inv #:
Description:Battery	Part Number: 70-5YR	Qty: 1.00	Cost: 43.60	Sell: 87.20
Vehicle: 1989 Jaguar XJ6 Vanden Plas Customer: Hankins, Dan Date: 9/17/2015	Engine: 3.6 219CID Inv.#: 146850 Mfg:			Trans: AUTO Vendor: Interstate Battery Vendor Inv #:
Description:Battery	Part Number: 70-5YR	Qty: 1.00	Cost: 43.60	Sell: 87.20
Vehicle: Customer: Wayne, John Date: 9/17/2015	Engine: Inv.#: 146851 Mfg:			Trans: Vendor: Interstate Battery Vendor Inv #:
Description:Battery	Part Number: 70-5YR	Qty: 1.00	Cost: 43.60	Sell: 87.20
Vehicle: 1991 Dodge Dakota Customer: Mack, Peter Date: 9/17/2015	Engine: Inv.#: 146852 Mfg:			Trans: Vendor: Interstate Battery Vendor Inv #:

MULTIPLE WAYS TO USE THE ALTERNATE PART FEATURE

Tip Alternate Part is used to create relationships from your part records to part numbers you don't carry. This is useful when a customer asks for an item by an outside part #. For example, you may normally carry Brand X batteries; some customers ask for a battery that uses Brand Y part #. Since you don't plan to carry Brand Y batteries, you decide to set up some Brand Y battery part #s as Alternate Parts to sell the Brand X batteries that you do stock. Every time you enter a Brand Y battery part # request, Manager SE will display the equivalent Brand X battery from your own Inventory list.



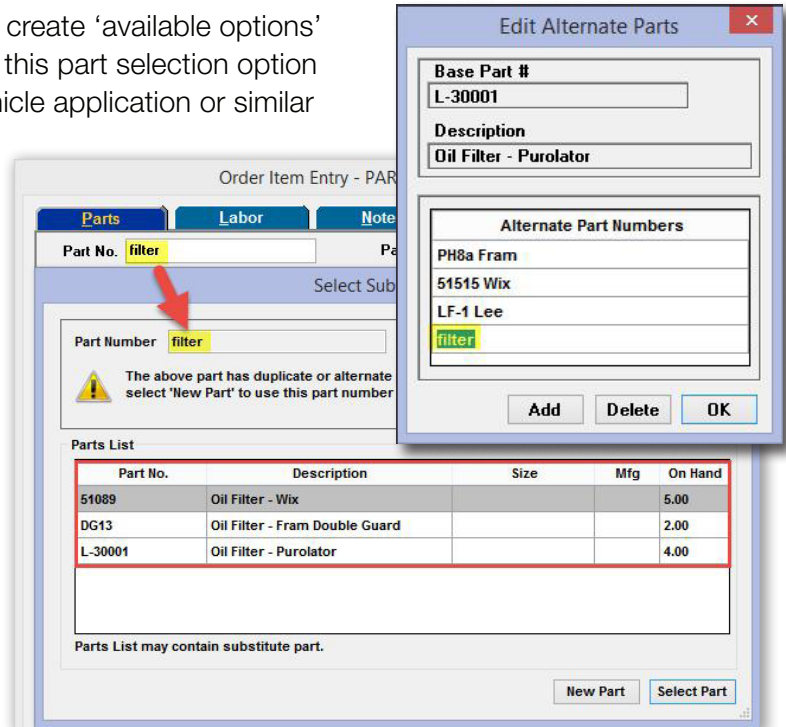
Adding Alternate Part ("24F-23456") to part record #24F-12345:



USING ALTERNATE PART FUNCTION TO CREATE PART LISTS

Tip The Alternate Part function can also be used to create ‘available options’ part lists to present choices to users. To trigger this part selection option to appear requires some kind of part name, vehicle application or similar phrase. This would be entered in each part record desired to create a relationship with the Alternate Part function. You can associate different brands of filters, batteries, radiators or even different grades of parts in a good-better-best fashion. It can be basically anything that helps users see options quickly to complete part sales as desired. For example, to pop up a list of oil filters, type ‘filter’ in Order Item Entry- PARTS and press tab; see a list for you to choose from and then transfer to the order.

Adding Alternate Part (“filter”) to part record #L-30001; then resulting part list displayed:



⊕ **Using DTCs (Trouble Codes) as Alternate Part:** “We had a Dodge Caravan Voyager in for an Evap code. It ended up being the hose to the canister under the vehicle (Mopar part #4861443AA). I decided to stock the hose. I entered as Alternate Part #s, the P code(s) (P0456 in this case) associated with hose failure. I’m going to start doing that for any parts that I enter that are related to a DTC. Then I can type a P code as a part # and come up with ANY parts that are related to the code, regardless of Year, Make & Model.”

⊕ **Alternate Part Idea for Tires:** “For tires, we use the actual size as part numbers. Example: P205/65R15, regardless of tire type or speed rating. Under alternate parts, I enter an abbreviated part number 2056515. Typing that abbreviated size gives me all the tires available in that size. Abbreviating the size also makes it MUCH quicker to type in. “

⊕ **Alternate Part Idea for Belts:** “We stock Napa belts. A typical size is 25-060950. The Napa catalog does not recognize alternate parts with dashes. For the above size, I enter 25060950 and 060950 in the alternate field. That solves the Napa problem and also gives a shorter number to type in when the size is already known.”

“So let me get this straight. You might have 10 different Automatic Trans fluids; Mercon 5, Toyota T4, etc, and they ALL have the same ALT number of ATF? So when you type in ATF, you get the whole list, yes? **That’s a great idea!**”

HOW TO UN-SELL A REVISION WHEN CUSTOMER CHANGES THEIR MIND

Q “Can I put a portion of an order back into a Sub-Estimate after I sell the Revision, without having to start all over?”

A “Yes. It is possible to highlight those lines on the Order screen by dragging the mouse, then selecting Edit, Cut (Ctrl + X), then click Revision tab, selecting an open Sub-Estimate slot, clicking Edit, Paste (Ctrl + V) to place it there.”

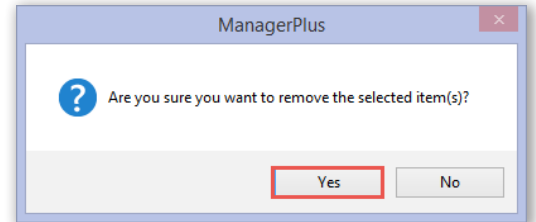
Use Edit menu or keyboard shortcuts:

File Edit Copy Ctrl-C Paste Ctrl-V

Time	Rate	Part No.	Descript
0.60	\$88.00		Check Charging System
			note
0.20	\$88.00		Lube, Oil & Filter LABOR
		ph13	Oil Filter - Fram
		10w30c	Eng Oil - 10w30 Castrol
0.00			

SubEst1	SubEst2	SubEst3	SubEst4	SubEst5
Total Hrs: 0.20				
	0.20	\$88.00		Lube, Oil & Filter LABOR
		ph13		Oil Filter - Fram
		10w30c		Eng Oil - 10w30 Castrol
	0.00			

Answer ‘Yes’ to remove selected line items from Order screen.

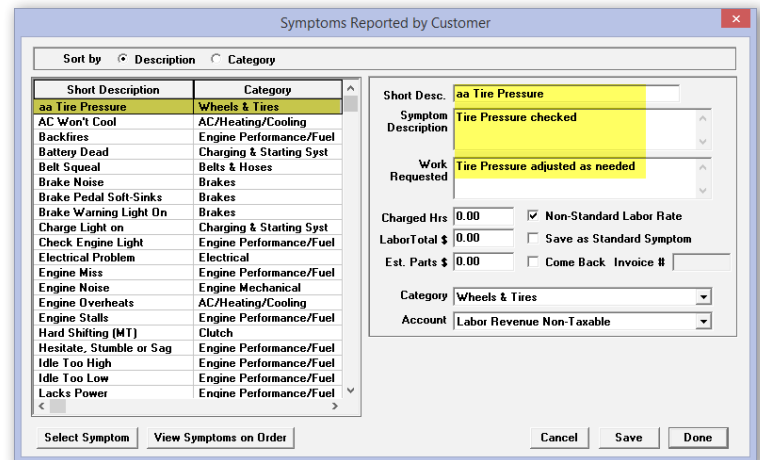
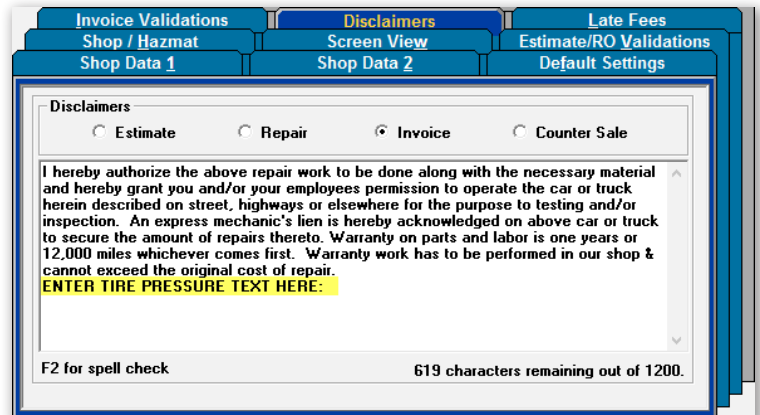


NEED TO HAVE TIRE PRESSURE APPEAR ON EVERY INVOICE

Q “In California we now have to print on every invoice that the tire pressure was checked and adjusted on every vehicle that comes into the shop. IE: Check and adjusted tire pressure as per door placard. Was wondering if any knew how to make this come up on every RO/INV automatically without having to manually input it? Thanks for any help.”

A If you are just making a generic statement and not entering actual readings, work it into your Invoice disclaimer text. Go to Setup - Shop Data - Disclaimers.

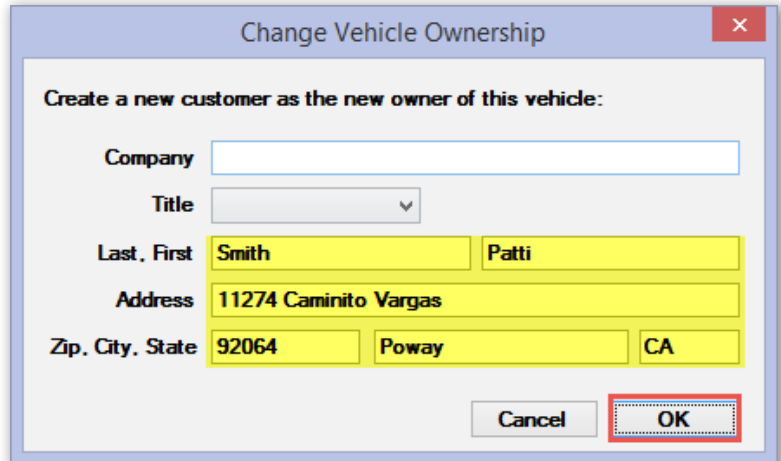
A If you need a popup reminder template to add actual readings to, consider a Symptoms screen entry. Check the Show Symptoms on New Orders in the Setup, Shop Data - ScreenView tab. I’d also craft the title of the ‘symptom’ so it lands first in the list (if you have others) regardless of how you sort; makes it easier to be reminded.”



VEHICLE COMING IN FROM ANOTHER SHOP; VIN ALREADY IN MY SYSTEM

Q “I have a question on how you handle entering vehicles that are at your facility from another facility where the vehicle is owned by a client/former client of yours. I have a truck here that we must have serviced in the past where another shop in town has sent it to me for a diagnostic opinion. I enter the VIN for a new vehicle under the repair shop’s account and of course the warning pops up that the vehicle already exists under a different client. So how do you go about handling that?”

A We suggest using the Change Ownership option with this vehicle as this will keep all repair history together. Go to Utilities – Vehicle Screen and enter the VIN for this vehicle. It should fill in the shop name it was posted under. Click on Change Ownership (below Recommendations) and then select New to enter the current owner’s information.

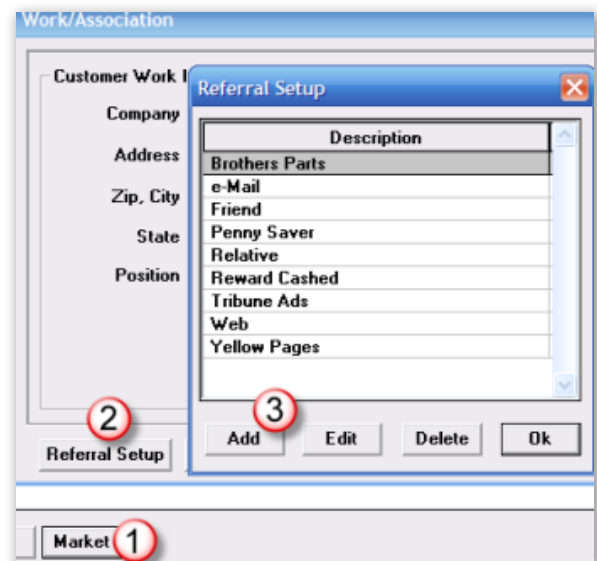


HOW AND WHERE TO ADD NEW REFERRAL TYPES TO THE REFERRAL LIST

Q “Does anyone know how to create more categories in Referrals? The only one that shows up on my list is ‘friend.’”

A “Open any customer record; follow the steps listed below to add new Referral entries.”

- 1 Click on Market
- 2 Select Referral Setup
- 3 Click on Add to create a new entry and OK to save it



USE THE SPECIAL ORDER FUNCTION IN CERTAIN SITUATIONS

Q “I’ve read several posts about Special Orders. I’ve been using Mitchell for about 13 years now and have never used it. What is a special order and what example can be given for its use? Just thinking maybe I’m missing out on something!”

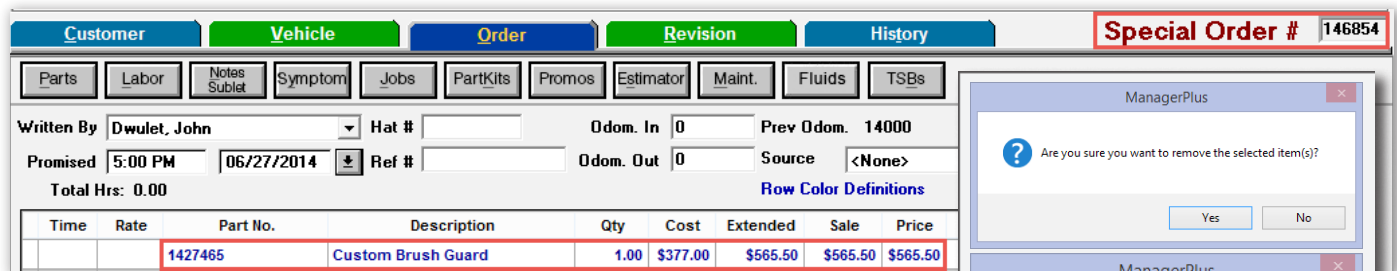
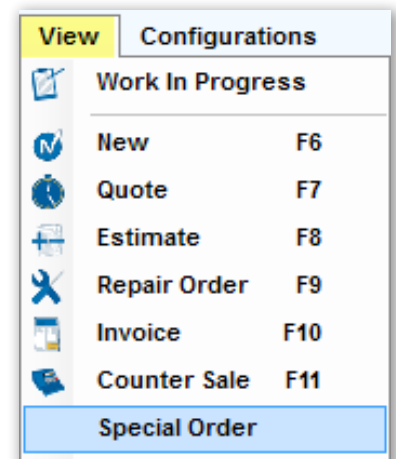
A “A Special Order is the way to go for parts ordered in advance. They play nice with purchase orders and everything gets tracked. There are some really cool things you can do with them. This is very helpful when you have approved work but the part must be ordered and will take some time to arrive. It allows you to close today’s order while tracking the part yet to arrive. I love Special Orders.”

Special Order # 000671

Special Order handles specialty part ordering situations; they are visible on the WIP screen as ‘SO’ record type. When parts are received, SO is either converted to Invoice for sale over the counter or Repair Order for any labor associated with installation in the shop.

You may create a Special Order using one of these two methods:

- 1 From the View Menu, select Special Order to create a new document.
- 2 Highlight item(s) in an existing order, then go to View Menu, select Special Order to create a new document from the selected item(s) as shown below.



The Customer screen always displays a reminder if an SO exists for that customer. You may also highlight certain lines in an RO and start a SO for those lines only by then clicking on View / Special Order.

Customer Snapshot

Lifetime \$ Spent	864.80
Lifetime Invoices	2
Invoice \$ Avg	432.40
Avg Yearly Visits	0.00
Last Visit Date	7/6/2013
<input checked="" type="checkbox"/> Include in CRM Campaign	
1 Special Order(s)	

ManagerPlus

Start a Special Order for the line(s) selected?

Yes No

This dialog confirms that you are removing selected line(s) from existing order and moving them to a new one.



For more information:

Call us: 888-724-6742 | Visit us: www.mitchell1.com

Or find your local Mitchell 1 sales representative: www.mitchellrep.com