ALLDATA MANAGE® Online
USER GUIDE

OVERVIEW

This user guide is designed to teach new users to begin estimates, create repair orders and process invoices as well as email and text customers effectively.

WALK THRUS

In-product, step-by-step guidance will show you how to set up and customize Manage Online for your shop's needs.

Look for this icon in the top corner of Manage Online.

SUPPORT SITE

ALLDATAsupport.com contains detailed articles on how to use features and functions of Manage Online. These articles are a great accompaniment to this workbook. You can print any article, view FAQs, etc.

Look for this icon througout this user guide for links to specific how-to articles.

VIDEO TUTORIALS

These short YouTube tutorials will demonstrate how to perform a number of functions in Manage Online to help speed up your work flow and get the most out of your investment.

Look for this icon througout this user guide for links to specific YouTube tutorials.

TABLE OF CONTENTS

Welcome to All-Time Auto Repair!
You've been hired as a new service writer and the owner, Al Morgan,
has just purchased ALLDATA Manage Online for his shop management needs.

Al bought Manage Online to increase his shop's efficiency, increase sales and keep his customer base coming back for additional services.

He's asking you to log in right now and get started on your first day of work!
He's not in today but his email is below with the things he wants you to learn.

Manage Online Getting Started

Action Items

Can you figure these things out today?

1. How do I log in to Manage Online?
2. How do I complete set up?
3. Is there support and help in the product?
4. How is the main screen laid out?
5. What's the workflow look like?

Thanks Al.

Al Morgan
ALL-TIME AUTO REPAIR
555-555-555

SECTION 1

FIND OUT

1. How to log in to Manage Online
2. How to complete setup
3. Where to get support and help in the product
4. How the main screen is laid out
5. What the workflow looks like

QUICK TIP

Stay within the Manage Online pop up window
You can log in to Manage Online from:
- Manageonline.ALLDATA.com
- ALLDATA.com/login-center

SECTION 1

SETUP AND CUSTOMIZATION

Logging In

1. Open Google Chrome (Version 40 or later) or Internet Explorer (Version 9 or later)
2. Go to manageonline.alldata.com (no 'http' or 'www')
3. Click **Login**
4. Enter your Username and Password

If you are unable to log in or are experiencing difficulties, please contact the Support Team:
http://alldatasupport.com/contact-us

Getting Set Up

Step-by-step guidance has been developed to help you customize Manage Online for your shop's needs.

As soon as you log in, just follow the **Primary Setup** step-by-step guidance that will automatically open. Then move on to the **Workflow Setup** to further customize Manage Online!
If you'd like to set up any third-party integrations, just go through **Setup: Third-Party.** A setup guide has been developed and can be downloaded here

Things to have handy as you complete set up:

• Shop labor rates

• Shop tax rates

• Technicians' names and rate of pay

• Service Writers' names

• Usernames and passwords for electronic parts vendors

• Shop payment methods

• Sales Class Codes from your accountant

EXERCISE 1

Primary Setup

What information is required to enter into Manage Online to start writing Repair Orders?

You've just been given your login credentials to Manage Online. Now what? How do you get started?

EXERCISE

Complete the in-product steps for **Primary Setup** to set up your labor and tax rates, vendors, pricing, technicians etc. Ensure you have your labor and tax rates and parts vendor credentials handy to enter when completing this section.

- Enter vendors/electronic catalogs
- Set up different tax rates
- Set up labor costs

Workflow Setup

You have completed the primary setup.

What other information should you enter to further customize and get the most out of Manage Online?

EXERCISE

Complete the in-product steps for **Workflow Setup** to enter additional code and user options settings.

- Symptoms, Work Descriptions, Advisory Notes
- Suggested Jobs
- Custom Jobs
- Deferred Jobs and Media Codes
- Status, Work Types,
- Messages and Reminder Types

Setup: Third-Party

Manage Online integrates with a number of third-party vendors to enable additional marketing features, accounting services, credit card processing and service history reporting.

Do you use QuickBooks for your accounting? Are you a DemandForce or MechanicNet customer? Are you a myCarfax-enabled repair shop?

EXERCISE

Complete the in-product steps for **Setup: Third Party** to activate integrations with companies such as myCARFAX, QuickBooks and more!

- QuickBooks Online
- QuickBooks Desktop Export
- myCARFAX
- DemandForce or MechanicNet

SECTION 1

WORK SCREEN OVERVIEW

Now that you have completed most or all of the setup and customization, let's take a look at the Work screen, including **Add Job** and **Add Item.**

Main Work Screen

Top Menu Bar

- The **House** icon and the **Work** tab return you to the Work screen from anywhere in the program.
- **New Document** will start a new Work document for the current customer.
- **Clear All** clears the Work screen; you will be prompted to save any current document.
- **Home** returns you to the Home Page.
- **Schedule** opens the scheduler.
- **WIP** takes you into the Work In Progress screen

Top Menu Bar

SECTION 1

Document Command Bar

**The first six tabs on the Document Command bar are:**

- **Estimate** creates an Estimate or Quote depending on the setup choice you made in User Options >> General.

- **Create R/O** creates a Repair Order from the Estimate or Work document currently on the screen.

- **Assign R/O** is used with the shop Schedule feature to place the Repair Order on the schedule.

- **Invoice** is used when all the work is completed. Click to record payment and close the invoice.

- **Split** is used only when splitting totals between third-parties such as insurance companies. This allows two or more payers on one invoice.

- **Credit** is used to issue a credit for parts and/or labor.

Document Command Bar

The last three tabs on the Document Command bar are:

- **Print** opens a print preview window with options to print or email the document.

- **Discounts** opens the discount management section where you can apply discounts as desired or view the Profit Margins estimator.

- **Order/Receive** allows you to order parts, receive them when they are delivered, and also checks the availability of parts.
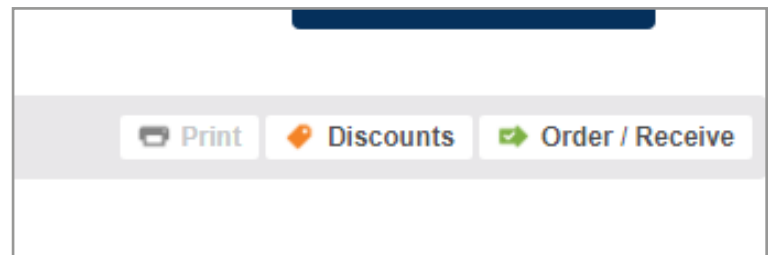
Document Command Bar

SECTION 1

JOB GROUPING

What is a Job Grouping? A Job Grouping is a header on a Work document that organizes parts and labor into Jobs. This also allows Job Groupings to be "deferred" to a later date.
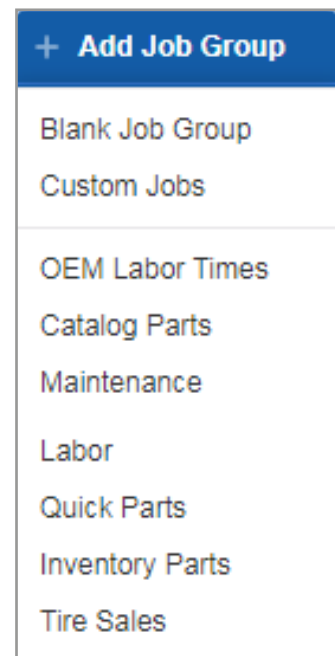
Using Add Job Group

Add Job Group allows you to create Job Groupings, as well as add parts, labor, custom jobs and tires to a Work document.

Blank Job Group is used to name a new Job Grouping and assign a Technician if desired.

Clicking any of the following items will add them as a SEPARATE JOB GROUPING. To add additional items to a SINGLE job, use the **Add Item** icon as explained in "Using Add Item."

- **Custom Jobs** allows you to add pre-built Custom Jobs directly to the Work document.

- **OEM Labor Times** gives you access to the Labor catalog and part information.

- **Catalog Parts** takes you to the electronic OEM and aftermarket catalogs used for electronic parts ordering.

- **Maintenance** gives you access to manufacturer recommended service interval jobs and information.

- **Labor** adds a labor line item manually.

- **Quick Parts** is a list of commonly used items.

- **Inventory Parts** allows you to add a part from your inventory parts list.

- **Tire Sales** is exclusively for adding tires and related charges from your tire inventory.

Add Job Group

Using Add Item [+ Item]

The **Add Item** button adds additional items to an existing Job Grouping.

This means you can add labor and parts from the OEM and after-market catalogs, parts from the 'Quick Parts' list or inventory and a Labor line item from your Labor Codes list, all to an existing job.

Add Item displays the same list as Add Job, but does not include Blank Job Group or Custom Jobs. In addition, Symptoms & DTCs, Work Descriptions, Work Performed, and Advisory Notes can be added directly to the Job.

Code	Description	Check Stock	Sell	Qty	Disc %	Tax %	Total +Tax	Actions
+ Item	**Fuel Pump**						397.59	••• ✕
LAB1	Shop Labor		90.00	2.0	0.00	6.0	190.80	••• ✕
NIP951-0024	Fuel Pump Rebui... more		193.98	1	0.00	6.0	205.62	••• ✕
AAA203660	Hose Clamp 1/2in	S	1.10	1	0.00	6.0	1.17	••• ✕
+ Item	**Scheduled Maintenance**						190.80	••• ✕
LAB1	Normal Service - 60000 Miles or 96000 Kilometers		90.00	2.0	0.00	6.0	190.80	••• ✕
+ Item	**Inspection**						111.30	••• ✕
LAB3	Inspection Labor - (State Inspection Schedule)		105.00	1	0.00	6.0	111.30	••• ✕
+ Item	**Battery**						284.35	••• ✕
LAB1	Replace - Battery		90.00	0.5	0.00	6.0	47.70	••• ✕
JCI35-DLG	Battery	✓	205.25	1	0.00	6.0	217.57	••• ✕
JCI35-DLG	CORE - Battery	⟳	18.00	1	0.00	6.0	19.08	•••
	Shop Supplies		5.00	-	0.00	6.0	5.30	
	Hazmat			1	-	-	5.30	

Mileage IN 6103 Confirm   OUT 6103 Confirm

+ Add Job Group

Planned Hours 0.00

Sub Total	938.33
Tax	56.31
Total	**994.64**

Estimate | Update R/O | Assign R/O | Invoice | Split | Credit   🖨 Print   🏷 Discounts   ➡ Order / Receive

Job Grouping

SECTION 1

BASIC ESTIMATES

Manage Online can perform a number of functions which can increase the efficiency and profitability of your shop. But there are really only six steps to creating a quick estimate.

Six Steps to Creating a Basic Estimate. See image on next page

1. Select a **Customer** and **Vehicle**

2. Add **Symptoms**

3. Select a **Service Writer** & **Technician**

4. Add **Job**(s)

5. Edit **Job** to add parts/labor

6. Click **Estimate** to save your work order

SECTION 1

Basic Estimate

REMEMBER!

Use the Add Job Group drop-down list to ADD a job to the Work document.

Use the Add Item drop-down list to add LINE ITEMS to a JOB already on the Work document.

SCENARIO 2

You completed all the set up for Manage Online and it was actually pretty easy!

You were about to check out the other step-by-step guidance when you notice a customer pull up in front of the shop.

You greet Mrs. Ashleigh at her vehicle and she states that:

- Her brakes seem spongy and they sometimes squeak.
- She noticed fluid on the floor of her garage the other day.

She hasn't been to your shop before so you need to add her contact details and her vehicle information to Manage Online.
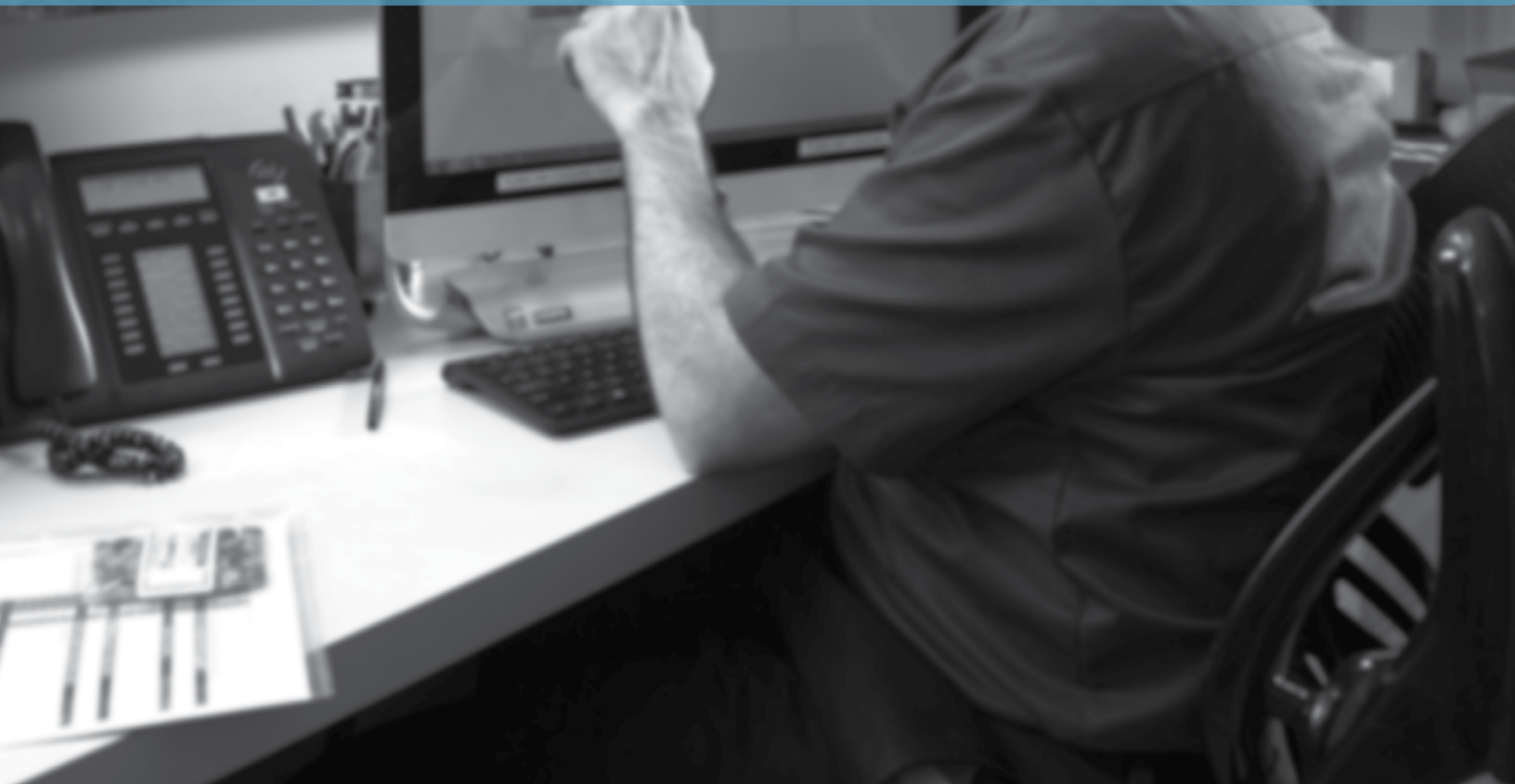
SECTION 2

FIND OUT

- Best practices for adding new customers and vehicles
- How to add new customers and vehicles
- How to search existing customers and vehicles

QUICK TIP

- Enabling myCARFAX can speed up adding new vehicles by using QuickVIN
- Enabling myCARFAX can also help you recommend additional services by reviewing the customer's service history

SECTION 2

CUSTOMERS AND VEHICLES BEST PRACTICE

Adding New Customers

Filling out as much customer information as possible allows you to communicate efficiently with your customers, capture complete reporting information and gather information about your customers' needs.

• Adding new customers before adding their vehicle information saves time.

• Leave the **Customer ID** box blank. Manage Online will auto-generate a unique account ID for this customer based on their last name, or you can enter your own.

• Use **Last Name** to enter the business name (if not an individual).

• Enter the zip code then click **Lookup** to auto-fill city/state.

• **Default Labor Rate** is entered automatically when the record is saved. If a you have a labor rate other than the default (fleet, military etc.) you should select it here.

• Check the **Contact By** options to designate which contact options are best when using the Customer Relationship Management feature.

Adding New Vehicles

Filling out as much vehicle information as possible allows you to provide valuable information to your Technicians and target your marketing to specific vehicle types.

• The license must be entered to save and display the vehicle on the customer screen.

• Enter **License** and **State** to look up the VIN using QuickVIN™ by myCARFAX.

• **VIN Lookup** can decode the Year, Make, Model, and Sub Model of the vehicle.
  If vehicle is not a passenger car or light truck, click the **Non ACES Vehicle** check box and manually enter the information.

ADDING CUSTOMERS & VEHICLES

Follow the instructions below for adding a new customer and vehicle.
When you're ready, complete the exercise to add a customer and vehicle of your own.

Adding Customers

To add a new customer, click **Customer** >> **New**
Fill in the customer information.

If the **Customer ID** is left blank, one will be created automatically.

Save time by using **Lookup** to complete the customer address.
After entering in all required information, click **Save.**

Customer Details Screen

Search Existing Customers

To search for an existing customer, click **Customer**
In the **Customer ID** field enter the customers first or last name and click **Search,** OR type **%** to see a list of all your customers.
If you know the customers I.D. (typically the first 3 letters of the customer's last name) enter it and click **Lookup** to narrow your results when searching the database.

Adding Vehicles

Select a customer.
Click **Vehicle.**
Click **New** >> fill in the vehicle information. Click **Save.**

Adding a Vehicle

Search Existing Vehicles

If you know a vehicle is in your database click **Vehicle** >> type a license plate number >>click **Lookup.**

For a full vehicle search, click **Vehicle** >> click Search. Type % as the License number to display all customer vehicles on file. Click the check mark icon for the vehicle you want to select.

From the Customer screen, select a vehicle from the **Vehicle** List. Click the **Work** tab to return to the Work screen and display the selected vehicle.

EXERCISE 2

For this exercise and others in this user guide, choose a customer and vehicle information that is relevant to you.

You could even choose yourself and your own vehicle!
You can always delete a customer and vehicle record if you're working in your new Manage Online database.

Customer

Customer ID
ASH001

Title & First Name
Miss | Ashley

Last Name/Business
Ashleigh

Address
467 W. Vine Road

City Hollister
State CA California
Zip Code 95023 | Lookup | G

Status
D - Deleted

Adding New Customer and Vehicle

- Leave the Customer ID blank.
- Enter a new customer name, address.
- Use the Zip Code Lookup to complete the customer address.
- Choose Msg, Phone and Email as contact preferences.
- Complete the contact details for your customer.
- Enter customer's vehicle information from the customer screen.
- Select Vehicle >> New.
- If you have myCARFAX enabled use QuickVIN to decode a license plate for your state.
- Alternately you can enter a VIN and click Lookup to populate the vehicle information, or manually select information from the dropdown lists.

Your customer tells you she has a second vehicle her husband drives and would like to bring it in another time.

How would you add a second vehicle to this customer's account?
Click the article icon above

SCENARIO 3

You send Mrs. Ashleigh on her way with a promise to email her the Estimate.

Al calls you (he's still not in the shop yet!) to ask how it's going. He's happy that you've written up a new customer and he wants to make sure you complete the Estimate properly and message Mrs. Ashleigh efficiently, so she'll be happy to bring in her other vehicle and tell all her friends about the great service.

He says filling out the Work screen properly is important because he's a stickler for details.

Then he emails you to make sure you've got all this covered.

Remember: Fill out the Work document properly

Action Items

Hey good work with the new customer, make sure you've got these things covered. I want her to come back!

1. How do you add symptoms and a work description?
2. Does this thing have custom jobs?
3. How do I start an estimate or repair order?
4. How do I order parts electronically?

Thanks Al.

Al Morgan
ALL-TIME AUTO REPAIR
555-555-555

SECTION 3

FIND OUT

1. How to add symptoms and a work description
2. How to use custom jobs
3. How to start an estimate or repair order
4. How to order parts electronically

QUICK TIP
There are two options for finding current customers

1. Type in the % sign to see all customers
2. Use the first three letters of the customer's last name

SECTION 3

CUSTOM JOBS

Custom Jobs are prebuilt jobs that can be quickly added to the Work document. These jobs are built by the user and saved to their database so they can be later applied when building a Work document. Custom Jobs can be used for common jobs that your shop handles on a daily basis like timing belt jobs, fuel pump jobs or diagnostic work, as well as "shop specials" like oil change, tune-up, or brake specials.

Creating Custom Jobs
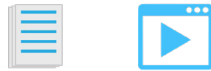
Make sure you have added parts into your inventory and have created line codes.

Click **Setup** >> **Custom Jobs.**
Enter a **Job Name** >> **Description.**
Leave **Sales Class Code** blank. Allow Manage Online to set your default sales class code.

Entering a **Job Name** and clicking **Find** will search for an existing job with that name.
Note: The **Description** will appear on the customer's invoice.

Custom Job Maintenance

Job Name Find	Description			Sales Class Code		Update Cancel
FBRK1	Replace Front Disc Brakes and Rotors					
Price Type	Category	Tax Code	Cost	Sell	Labor Rate	
Standard	Brakes	1 - Parts	0.00	0.00	Use Customer Rate	Active
Type	Line Code Code Find	Description		Qty	Sell	
P - Product						Search Add Clear
Override Prices	Trade Price Cost Price					

Type	Code	Description	Catalog	Qty	Sell	Total	Delete	Edit
PG		Brake Pad	OEM	1.00	0.00	0.00	✖	✎
PG		Brake Pad/Shoe - Front	AutoZone	1.00	0.00	0.00	✖	✎
PG		Brake Rotor - Front	AutoZone	1.00	0.00	0.00	✖	✎
P	3MI08496	Silicone Brake Lubricant		2.00	1.99	3.98	✖	✎
P	AAAAB12	Brake Fluid - 12oz		1.00	3.29	3.29	✖	✎
P	AAAAZP-10ULV	Brake Cleaner		2.00	3.99	7.98	✖	✎
WD	WD0006	Remove and replace front brake pads and rotors. Torque and lubricate fasteners and moving parts based on manufacturer specifications. Please perform and advise.		0.00	0.00	0.00	✖	✎

| Filter | | | | Job Total | 15.25 |

Custom Job Maintenance Screen

Job Name	Description	Type	Active	Price	Delete	Edit
2AL	Alignment - Two-Wheel	Fixed	Active	79.99	✖	✎
4AL	Alignment - Four-Wheel	Fixed	Active	129.99	✖	✎
BATT	Battery	Package	Active	199.99	✖	✎
FBRK1	Replace Front Disc Brakes and Rotors	Standard	Active	0.00	✖	✎
FIC	Fuel Injection Clean	Fixed	Active	59.99	✖	✎
LOF2PAK	Synthetic Oil Change Special	Package	Active	79.95	✖	✎
OILSP1	Conv. Oil Change Special	Package	Active	34.95	✖	✎
TFSV	Transmission Filter Service	Standard	Active	0.00	✖	✎

Custom Jobs List

CUSTOM JOB PRICE TYPES

Custom Job: Standard

This is the typical custom job that receives its pricing from the total of parts and labor added to that custom Job.

Situation: The shop has a "Replace Front Disc Brakes and Rotors" job that is fairly standard in their shop. The shop owner utilizes the "Standard" custom job in this case, because depending on the vehicle, parts and labor pricing will vary.

Code	Description	Check Stock	Sell	Qty	Disc %	Tax %	Total +Tax	Actions
∧ + Item ↑ ↓	Blank						0.00	••• ✕
∧ + Item ↑ ↓	Replace Front Disc Brakes and Rotors						368.82	••• ✕
Work Description	Remove and replace front brake pads and rotors. Torque and lubricate fasteners and moving...more							••• ✕
LAB1	Replace - Brake Pad - Front Pads		85.00	1.0	0.00	6.0	90.10	••• ✕
LAB1	Replace - Brake Pad - NOTE - To R&I or R&R Rotor,...more		85.00	0.2	0.00	6.0	18.02	••• ✕
AAA3MI08496	Silicone Brake Lubricant		0.00	2	0.00	6.0	0.00	••• ✕
AAAAAAAB12	Brake Fluid - 12oz		0.00	1	0.00	6.0	0.00	••• ✕
AAAAAAAZP-10ULV	Brake Cleaner		0.00	2	0.00	6.0	0.00	••• ✕
EPADG465A	Brake Pads - Front		57.98	1	0.00	6.0	61.46	••• ✕
DGR31311DG	Brake Rotor - Front		93.98	2	0.00	6.0	199.24	••• ✕
	Shop Supplies		6.96	-	0.00	6.0	7.38	
	Hazmat			0	-	-	0.00	
	Planned Hours 0.00				Sub Total		354.90	
					Tax		21.30	
					Total		**376.20**	

Standard Custom Job Example

Custom Job: Fixed Price

This type of custom job allows you set a "fixed" price for the entire job. This price will not change based on the dollar amount of parts and labor in the custom job. When this job is applied to the Work document, each part and labor line will appear with a $0.00 price, however the "fixed" price set when creating the custom job will show as the total price for that entire job grouping.

Situation: The shop has a standard rate for performing a two-wheel alignment. The shop owner decides to make a "fixed price" custom job, since this rate is constant – regardless of vehicle. In this case, the shop owner has decided to add a labor line, so the technician can track their time. Adding lines to a "fixed price" custom job is not required, it just depends on how you choose to run your shop.

Code	Description	Sell	Qty	Disc %	Tax %	Total +Tax	Actions
∧ + Item ↑ ↓	Alignment - Two-Wheel					84.79	••• ✕
ALGN	Labor - Alignment	0.00	1.0	0.00	6.0	0.00	••• ✕
2AL	Alignment - Two-Wheel	79.99	1	0.00	6.0	84.79	••• ✕
	Shop Supplies	1.60	-	0.00	6.0	1.70	
	Hazmat		0	-	-	0.00	
	Planned Hours 0.00			Sub Total		81.59	
				Tax		4.90	
				Total		**86.49**	

Fixed Price Custom Job Example

CUSTOM JOB PRICE TYPES

Custom Job: Package Price

Use Package Price jobs to create in-house specials such as conventional oil changes, shock specials, brake specials, tune-ups, etc.
Essentially, these will be jobs you advertise. They can help you get the customers in the door (i.e. loss leaders), so you can further examine their vehicle and see what other services they may need to get their car back to optimal working condition.

For example, If you want to advertise an "Oil Change Special (Starting at 44.95)" you would set the sell price at 44.95, add a labor line, add a Catalog Group for an integrated parts catalog to search for oil filters, and a separate catalog group for Engine Oil. Once you add this to the Work document, select the parts in the catalog and add it to the Work document – you will have the true total.
In this example, the pricing for this would break down like this:

	$3.99	(Oil Filter, qty. 1)
+	$24.95	(Engine Oil, qty. 5)
	$16.01	(Oil Change Labor Line)

Situation: The shop has a promotional "Oil Change Special (Starting at 44.95)." The shop owner decides to create a "package price" custom job for this job, as it allows the Service Writers to be more efficient when creating a repair order.

Code	Description	Check Stock	Sell	Qty	Disc %	Tax %	Total +Tax	Actions
+ Item	Oil Change Special						47.64	••• ✕
Work Description	Perform Conventional Oil Change using the correct fluid and filter types based on the...more							••• ✕
LOF	Oil Change Labor		12.07	1.0	0.00	6.0	12.79	
CTLSTPHME5W201Q	Engine Oil		5.58	5	0.00	6.0	29.57	••• ✕
FRCPH7317	Oil Filter		4.98	1	0.00	6.0	5.28	••• ✕
	Shop Supplies		0.90	-	0.00	6.0	0.95	
	Hazmat			0	-	-	0.00	
	Planned Hours 0.00				Sub Total		45.85	
					Tax		2.74	
					Total		48.59	

Package Price Custom Job Example

Custom Job: Complete Price

Similar to Fixed Price jobs, Complete Price jobs also allow you to set a final sell price to the job (not including taxes). This price will not change based on the dollar amount of parts and labor in the custom job. With Custom Price jobs, taxes are applied to each part and labor line and will reflect any difference in price between the total of all lines and the job's "final set price".

Situation: The shop has a fleet maintenance contract for various services at specific price points. To keep job prices consistant and still maintain proper tracking of taxes for individual parts and labor lines, the owner uses a "complete price" custom job.

Code	Description	Check Stock	Sell	Qty	Disc %	Tax %	Total +Tax	Actions
+ Item	Complete Shocks/Struts Special						847.95	••• ✕
LAB1	Replace - Suspension Strut / Shock Absorber - Front...more		85.00	2.6	0.00	6.0	234.26	••• ✕
LAB1	Replace - Suspension Strut / Shock Absorber - Rear...more		85.00	1.6	0.00	6.0	144.16	••• ✕
AUBG52188	Shock/Strut - Front		179.98	1	0.00	6.0	190.78	••• ✕
AUBG51966	Shock/Strut - Rear		103.98	1	0.00	6.0	110.22	••• ✕
	Shop Supplies		16.00	-	0.00	6.0	16.96	
	Hazmat			0	-	-	0.00	
	Planned Hours 0.00				Sub Total		815.95	
					Tax		48.96	
					Total		864.91	

Complete Price Custom Job Example

SECTION 3

SYMPTOMS & DTCS
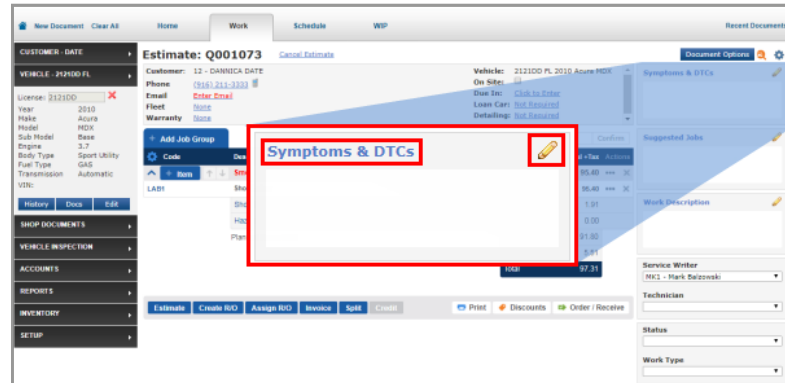
Add a New Symptom

From the Work Screen:
Click **Symptoms & DTCs** or the **pencil** icon.
Enter a description of the symptom.
Click **Add** to add the Symptom to the Work document only, or click **Save as** and enter a Summary (title) to add the symptom to your database and use it in the future.
Click **Document** and assign to a new or existing Job Group if necessary >> Click **Done.**

Symptoms and DTC Entry

Add a Pre-Written Symptom to the Work Document

Start typing a keyword from the Symptom Summary to filter the Predefined Symptom list.
Click the **green check mark**(s) for the symptom(s) you wish to add.
Click the **Pencil** next to the Selected Symptom >> make any necessary adjustments >> Click **Update.**
Click **Document** and assign to a new or existing Job Group if necessary >> Click **Done.**

Adding DTCs

From the Work screen:
Click **Symptoms & DTCs** or the **pencil** icon.
Select **DTCs.**
Enter the DTC in **Code** >> press **Enter** on your keyboard.
Click **Add** >> Add any additional DTCs
Click **Document** and assign to a new or existing Job Group if necessary >> Click **Done.**

Tip: Symptoms, DTC's, Work Descrcriptions, Work Performed and Advisory Notes will be automatically assigned to the associated Job when added with the Add Item (+ icon).
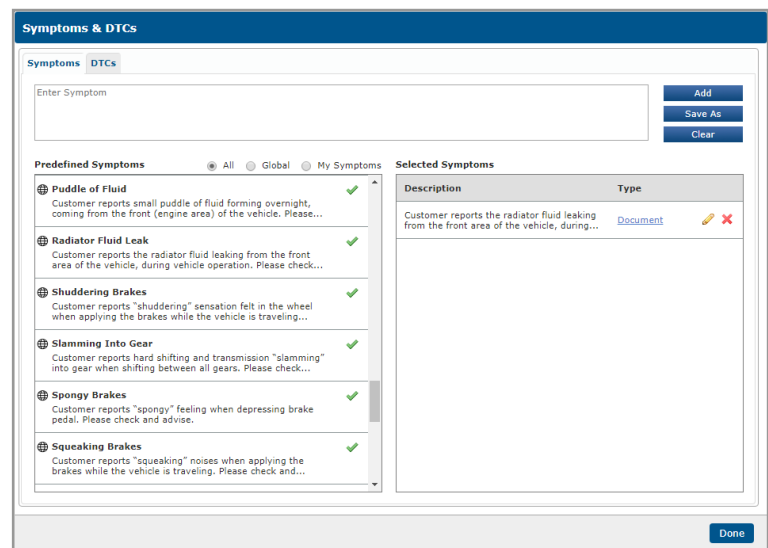

Saved Symptoms

SECTION 3

WORK DESCRIPTIONS

Add a Work Description

From the Work Screen:
Click **Work Description** or the **pencil** icon.
Enter a **Work Description**.
Click **Add** to add the Work Description to the Work document only, or click **Save as** and enter a Summary (title) to add the Work Description to your database and use it in the future.
Click **Document** and assign to a new or existing Job Group if necessary >> Click **Done.**
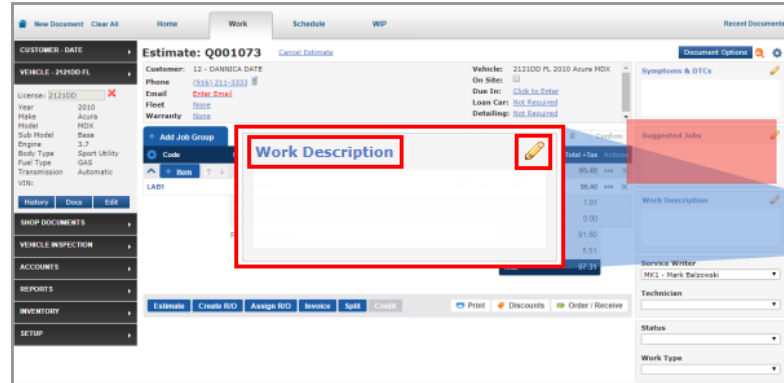
Work Description Entry

Add a Pre-Written Work Description to the Work Document

Start typing a keyword from the Work Description Summary to filter the Predefined Work Description list.
Click the **green check mark**(s) for the Work Description(s) you wish to add.
Click the **Pencil** next to the Selected Work Description >> make any necessary adjustments >> Click **Update.**
Click **Document** and assign to a new or existing Job Group if necessary >> Click **Done.**

Tip: Symptoms, DTC's, Work Descrcriptions, Work Performed and Advisory Notes will be automatically assigned to the associated Job when added with the Add Item (+ icon).
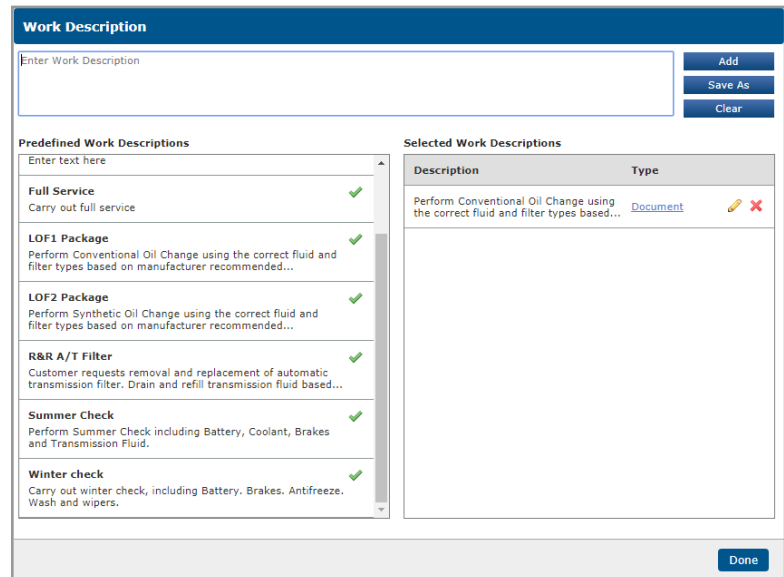
Saved Work Description

SECTION 3

ADVISORY & WORK PERFORMED NOTES

Advisory Notes are a great place to add recommended services or areas of concern that the vehicle owner should be notified of. As with **Symptoms** and **Work Descriptions** you can build a number of these in advance to be added to the Work document.

Add an Advisory Note

From the Work Screen:
Click **Advisory Notes** or the **pencil** icon.
Enter an **Advisory Note**.
Click **Add** to add the Advisory Note to the Work document only, or click **Save as** and enter a Summary (title) to add the Advisory Note to your database and use it in the future.
Click **Document** and assign to a new or existing Job Group if necessary >> Click **Done.**
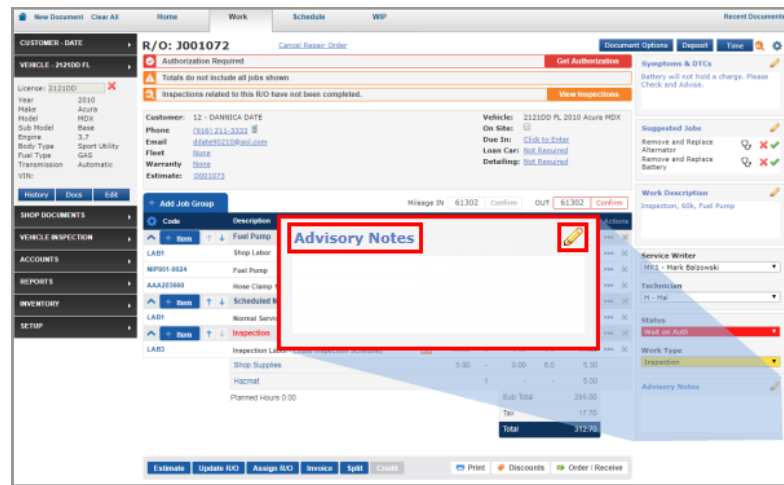
Advisory Note Entry

Add a Pre-Written Advisory Note to the Work Document

Start typing a keyword from the Advisory Note Summary to filter the Predefined Advisory notes list.
Click the **green check mark**(s) for the Advisory Notes(s) you wish to add.
Click the **Pencil** next to the Selected Advisory Note >> make any necessary adjustments >> Click **Update.**
Click **Document** and assign to a new or existing Job Group if necessary >> Click **Done.**

Tip: Symptoms, DTC's, Work Descrcriptions, Work Performed and Advisory Notes will be automatically assigned to the associated Job when added with the Add Item (+ icon).

Add a Work Performed Note

From the Work Screen:
Click **Add Item** (+ icon) next to a Job.
Enter a **Work Performed Note**.
Click **Add** to add the Work Performed Note to the Work document only, or click **Save as** and enter a Summary (title) to add the Work Performed Note to your database and use it in the future >> Click **Done.**
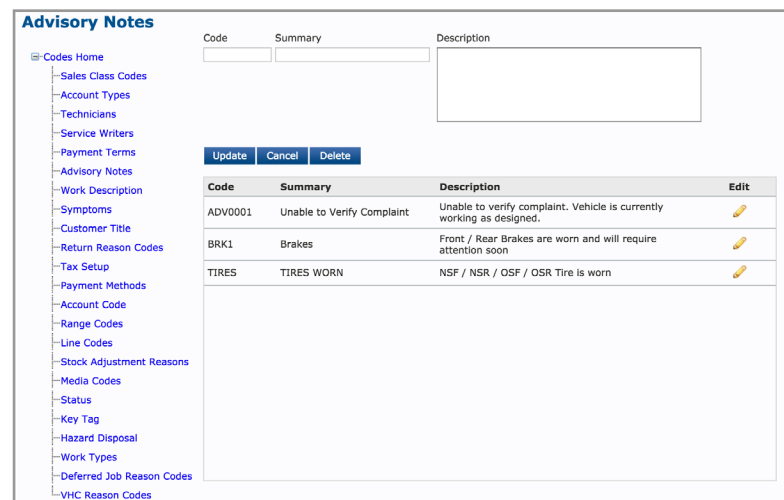
Saved Advisory Notes

SECTION 3

PARTS AND LABOR

In Parts and Labor catalogs "Passed Linked Parts" and "Basket Linked Parts" allow you to access OEM labor time specific to that job as well as access parts specific to that job.

Add Labor Using Default Labor Rate

On the **Work** screen, select **Add Job** >> **Labor.**
Type in a **Time** and **Discount** (if needed).
Select a **Technician.**
Click **Add** >> **Done.**

Upon clicking **Done,** the labor entered will add to your Work document under a new job grouping.
Clicking **Add Item** on the job grouping provides additional options to add to the job.

Modifying Existing Labor on a Work Document

On the **Work** tab, select the labor code for the labor item that needs to be changed.

Editing Labor Line

Item Edit Window

Adjust the **Qty** (Quantity) >> click **Update**.

SECTION 3

PARTS AND LABOR

Using Parts and Labor Catalogs

The Parts and Labor Catalog can be accessed by clicking one of the following options on the **Work** screen:

Accessing Parts and Labor Catalogs

- **OEM Labor Times:** Defaults to the **OEM** tab — Includes Parts ✔ — Includes Labor ✔

- **Catalog Parts:** Defaults to the **AutoZone** tab — Includes Parts ✔ — Includes Labor ☐

- **Maintenance:** Defaults to the **Maintenance** tab — Includes Parts ☐ — Includes Labor ✔

Once the catalog is open, it is easy to move between tabs for additional parts and labor.
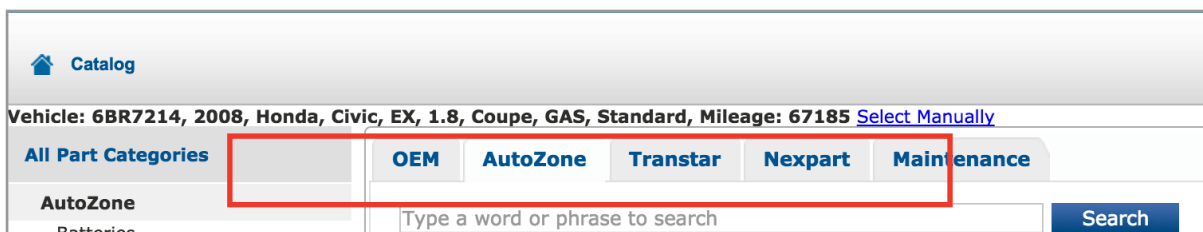
Parts Catalog Integrations

SECTION 3

GOOD BETTER BEST JOBS

Good Better Best options allow you to present 2-3 similar jobs to a customer.
This allows customers to easily see the difference in pricing for various tiers of parts or services.

Examples:

Brakes (Different brands, material types, etc.)
Oil (Synthetic / non-synthetic, weights, etc.)
Specials (Normal price vs. special pricing)

How to display Good Better Best options

1. Add 2-3 similar jobs (same job category) to a work document using one of the following methods:

Add precreated custom jobs.
Manually add items to each job.
Add or create a single job >> **clone the job** >> modify the items on the job.
Add or create a single job that includes all part and labor options >> **clone the job** >> delete the extra items that are not needed for that job option.

2. Click **add item** (+ icon) next to one of the jobs you want to display Good Better Best options for >> select **Good Better Best.**

3. Select 2-3 jobs as **Good, Better** or **Best** >> click **Okay**.

Note: All jobs on the ticket with the same job category will display as options.

4. Use the Click to select **Good Better Best** jobs link to display the **Select a Good/Better/Best Job** screen.

5. Select the job the customer has agreed to >> click **Finish.**

Note: The unselected jobs will be removed from work document.

Good Better Best Options

Good Better Best Selections

Click to Display Options

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EXERCISE 3

For this exercise and others in this user guide, choose a customer and vehicle information that is relevant to you.

You could even choose yourself and your own vehicle!
You can always delete a customer and vehicle record if you're working in your new Manage Online database.

Completing the Work Document

The following exercise will lead you through building a basic estimate using custom jobs

1. CUSTOMER AND VEHICLE INFORMATION
Go to the Customer Tab
Enter last three letters of customer name in the **Customer ID** field and click **Lookup.** OR
enter the **%** sign and click **Enter** for a list of all customers
Locate the customer
Click the green check
When the customer information displays, click the **Work** tab.
Note: If the customer has more than one vehicle, select it from the vehicle list before clicking the **Work** tab.
Enter 23602 for Mileage In and click **Confirm**.
Select a **Service Writer**
Select a **Technician**
Click **Symptoms** and select **Check Battery** or add a Symptom for "Check Battery".
Click **Done** to add it to the work area.

2. ADD A JOB USING A STANDARD CUSTOM JOB
Click **Add Job.**
Select Diagnosis & Inspection from the Categories column.
Select **Diagnostic - Electrical** from the list.
Click **Add Selected.**

3. ADD A SECOND JOB
Click **Add Job**. When the drop down list appears, click on **Blank.**
Enter a description of 'Replace Battery' and click **Update.** Click **Add Item** icon on this job.
Click **Quick Parts.**
Select the 12 V, top post battery, Qty of 1 OR a quick part you have previously created.
Click **Done**. Click **Estimate.**

Customer

Customer ID
ASH001

Title & First Name
Miss ⇕ Ashley
Last Name/Business
Ashleigh
Address
467 W. Vine Road

City Hollister
State CA California
Zip Code 95023 **Lookup** G

Status
D - Deleted ⇕

SCENARIO 4

Al has noticed the new customer entry and the Work document you've been working on. He's impressed at how quickly you've been picking it up but now he says this is "where the rubber meets the road."

He wants to make sure you can build a Work document efficiently with parts from an electronic catalog (his first call is AutoZone), then email the customer the estimate and send a text message stating that their car is in progress.

After a quick chat on the phone, you're ready to move on.
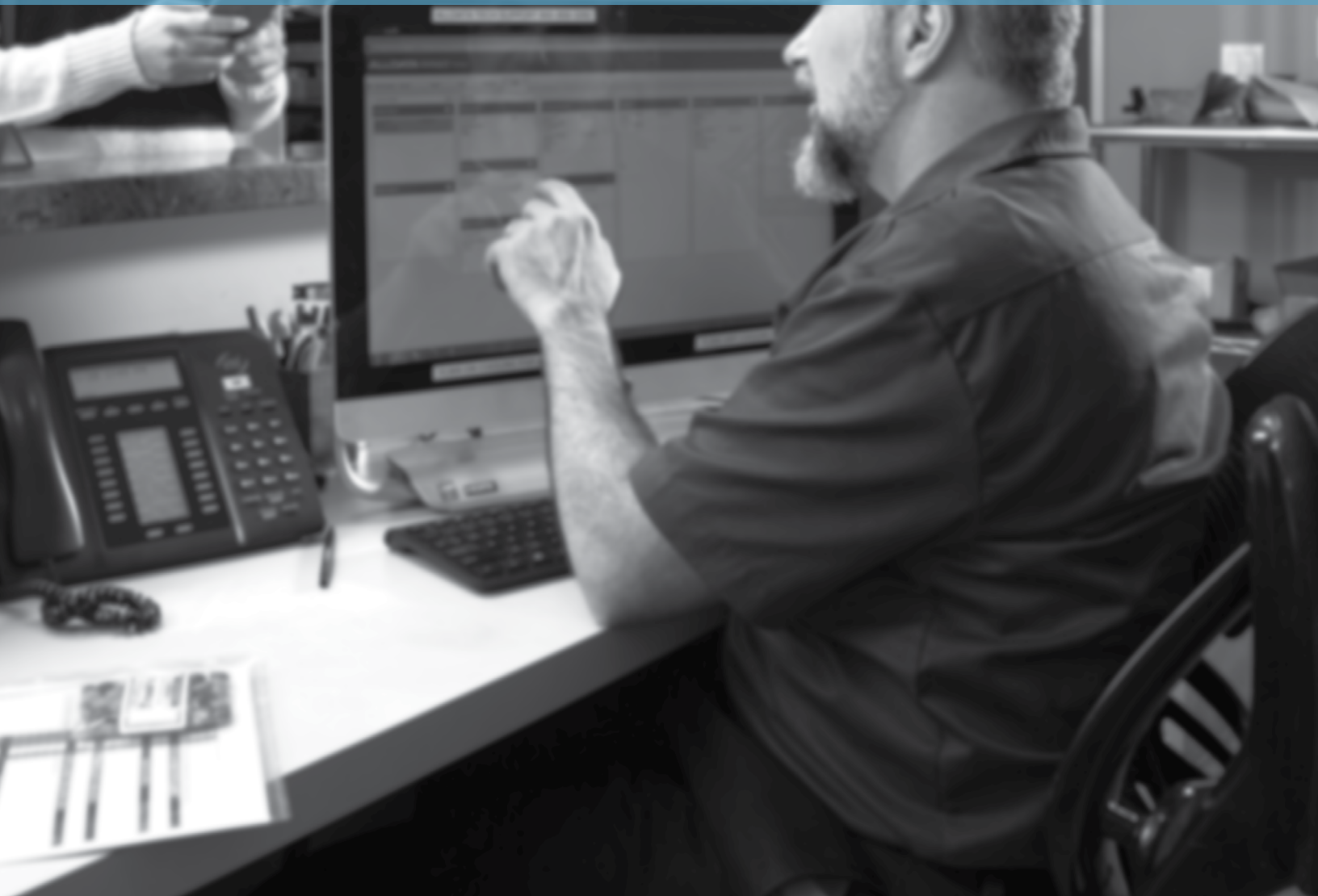
SECTION 4

FIND OUT

- How to email estimates and repair orders
- How to text customers from the Work screen

QUICK TIP

Don't forget to include your own phone number in outgoing text messages to ensure quick and easy replies. Customers are not able to reply directly to Manage Online.

SECTION 4

TEXTING AND EMAILING CUSTOMERS

Text and Email Directly from the Work Screen

With text and email features in Manage Online, you can send a text message to your customer directly from the Work document. Write a new message or send a predefined general text message. You can also email your estimates, repair orders and invoices.
Before emailing customers enter your Sender Email so your customers know the email is coming from your shop

Set up Email and Texts

Create email and text message templates for estimates, repair orders, invoices, credits etc.
To change emailing settings click **Setup** >>**User Options** >> **Emailing**.

Complete or update each message.
Confirm the Sender Email address and click **Update.**

Customer Texting

Write a single text or email message and send it to many customers, while automatically personalizing each message with information from your customer database.

Click **Setup** >> **User Options** >> **Messages**
Select **General**
Write a brief description and write a text message and/or email message.
Make a selection from the drop-down menu to insert customer information from your database.
Example: Dear [TITLE] [FNAME]
[LASTNAME] **Don't forget the space!**

SECTION 4

TEXTING AND EMAILING CUSTOMERS

Messaging Customers from the Work Screen

You can send a text message to your customer from the Work document.
Write a new message or send a predefined General text message.

From the **Work** Document:
Click the **cell phone** icon.

Select a **Predefined Message** or write a new message
>> click **Send.**

The message has been sent >> click **OK.**

Emailing customer RO

Tip: From any print preview window you can email the document
directly to your customer. No need to print!

EXERCISE 4

Email Your Customer

If it's not already on the Work screen, bring up your previous customer repair order onto the Work screen by searching **Shop Documents** for the repair order.

- Click **Shop Documents** >> select **Repair Order Search**

- Enter customer name into the **Name** field. To better filter results, enter as much information as available >> click **Search**

   Repair Orders will be displayed.

- Click the green check mark under **Open** to open the document on the **Work** screen.

   To email the repair order, click **Print**

- Select **Print Customer R/O**
- In the email field, type in the customer's email (your own email for this exercise) and click **Email.**
- Note: If you entered an email address in the customer information it will be pre-populated here. Check your email to see what customers will receive from you.

For information about changing the way your printed documents appear including how to add your shop's logo, click on the article icon above

Text Your Customer

You can send a text message to your customer from the Work document. Write a new message or send a predefined General text message.

If it's not already on the Work screen, bring up a customer's repair order onto the Work screen

From the Work document:
Click the **cell phone icon.**

In the Send Message field add your own cell phone number, including area code

Select a Predefined Message or write your own "Thanks for Coming" Message
>> Click **Send**
Note: Don't forget to include your shop's contact number in the message!

The message has been sent >> click **OK**.

For details on how to create messages, click on the article icon above

SCENARIO 5

Ok now you're cooking! Al finally comes into the shop and likes the progress so far. He tells you that he firmly believes in recommending additional services to customers but obviously they have the right to decline those recommended services.

He asks you to figure out if Manage Online can track deferred work and if you can message customers about their deferred work.

SECTION 5

FIND OUT

- How to defer a declined job or service
- How to message deferred work customers to get them back into my shop

QUICK TIP

Waiting for a customer to visit your shop to remind them of previously recommended services can be hit-or-miss. Capture lost revenue by proactively reminding customers of what their vehicle needs are.

SECTION 5

DEFERRED WORK

Overview

Using deferred work keeps track of recommended services or work that has been declined by your customers. You can defer any job on a Work document including part and labor items. An icon will indicate a customer has deferred work from a previous visit. Recall that deferred job and start a new Work document!

You can also send messages to all customers with deferred work for a given time range using the Customer Relationship Manager feature.

To Defer Work

From an Estimate or Repair Order, click the red X on the Job Grouping to be deferred.

A pop-up will appear
>> click **Defer**
Select the **Due Date, Reason** and **Deferred By**
>> click **Defer.**

Note: The Job Grouping will disappear from the Work document, and be recorded in the **Deferred Work** tab under Shop Documents.

Delete or Defer Job

Please confirm if you want to Delete or Defer the job:
Battery

[Delete] [Defer] [Cancel]

Defer Job option

View and Select Deferred Work

In the vehicle display, click **View Deferred Jobs**.

A pop-up will appear with previously deferred jobs

Select the job you wish to add to the repair order

The deferred job will now be included on the Work document.

VEHICLE - 6AGM919 CA

License:	6AGM919
Year	2011
Make	Jeep
Model	Patriot
Sub Model	Latitude
Engine	2.4
Body Type	Sport Utility
Fuel Type	GAS
Transmission	Automatic CVT
VIN:	

View Deferred Jobs

[History] [Docs] [Edit]

Customer /Vehicle Deferred Work

DEFERRED WORK

Sending Deferred Work Messages to Customers

Before using the Customer Relationship Manager, you must:

• Create Messages

• Edit the Sender Email Address

Click **Reports** >> **Customer Relationship Man**

Select the **Type**, **Deferred Work**

Select a **Date From** and **Date To**, or make no selection to display all >> click **Display.**

Select a **Contact Method** and **Message**

Select the customer(s) you would like to contact >> Click **Send**.

A pop-up message will appear >> click **OK**.

CRM Reminder Messaging

Customer Reminder Message Screen

SCENARIO 6

As Al looks over your shoulder he notices the tab in Manage Online titled WIP. "What's that thing for?" he asks you.

You tell Al that WIP is an abbreviation for Work in Progress and you think that this tab, along with the Scheduler, might be a good way to see all the shop's repair orders in progress, scheduled times and the bays the work is in.

Al tells you to look into it and get back to him with some ideas on how you can use those features to speed up the shop's work flow and get cars our the door faster!

SECTION 6

FIND OUT

- How to set up and use the Work in Progress
- How to use the Scheduler and the WIP to view the status of all your repair orders

QUICK TIP

- Create multiple WIP views for each of the major roles in your shop.
- Title the bays in your scheduler with the names of your techs working those bays or the work being performed (e.g. Emissions Inspections, Alignment, LOF etc.)

SCHEDULER

Overview

The Scheduler is used to schedule existing repair orders against available tech-hours of a shop. You can add an existing repair order (R/O) from the Work tab or create an R/O from the Schedule tab. You can also send messages to all customers with deferred work for a given time range using the Customer Relationship Manager.

Schedule an Existing R/O

On the Work tab, select **Assign R/O**.

Note: If the document is in Estimate status, it will be converted to an R/O when **Assign R/O** is selected.

On the **Schedule** tab, locate the R/O in the **R/Os Awaiting Assignment** list

Click and drag the R/O to the preferred location on the scheduler.

Schedule a New R/O

On the Schedule tab, select **New R/O**

Fill in the information on the **Create New R/O** screen >> select **Save.**

On the **Schedule** tab, locate the R/O in the **R/Os Awaiting Assignment** list.

Click and drag the R/O to the preferred location on the Scheduler.
This process will create a blank repair order with no associated parts and labor information. It is recommended to add parts, labor and any additional details to complete the R/O.

Add Details and Make Changes to a Scheduled R/O

Double click on the top line of the scheduled R/O.

Click the green check mark.

Complete the R/O by adding any necessary details.

Click **Update R/O**

Repair Order Scheduler
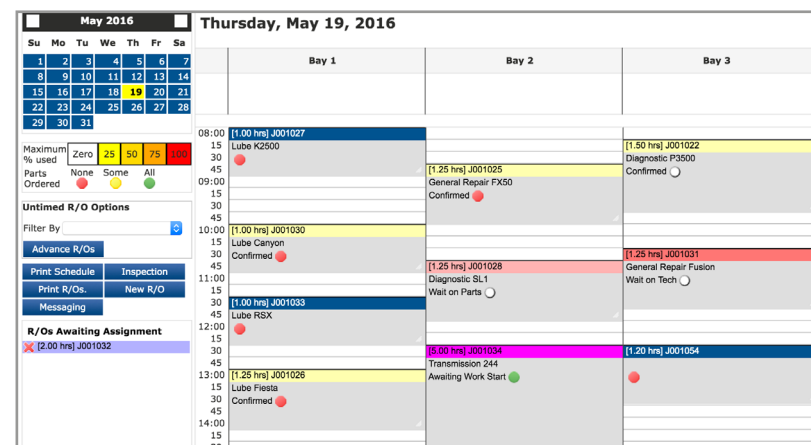
SECTION 6

WIP (WORK IN PROGRESS)

Overview

The WIP (Work In Progress) screen gives an at-a-glance view of the status of all active repair orders. The WIP screen comes with a default template that includes the five most basic status codes.
Additional templates can be created for each role in the shop (examples: Owner, Service Writer, Tech, etc.) that show just the statuses that are the most helpful for that role.

Article two explains all of the types of status codes, how to customize them, and how to create new templates for the WIP screen.

Article One

Navigating the WIP Screen

Article Two

If you haven't already, set up the WIP screen, click the **WIP** tab.

Select the desired WIP screen from the drop-down menu.

Optional: Filter the Repair Orders that display by entering keywords.

Examples: Customer name, vehicle type, license plate number.
To remove the filter and display all Repair Orders on that page again, click the refresh button.

To expand the WIP screen to the full size of the computer screen, click the toggle button.

Click and drag Repair Orders to different Statuses
Note: This will also change the Status on the Repair Order.

Adding a Repair Order to the WIP Screen

Vehicles will appear on the WIP screen when both of the following are in place:

A Status has been selected on the Repair Order.

The Repair Order is booked for today and/or is marked as On Site.

Note: Selecting a Status (except for Pre-Arrival) will automatically mark a vehicle as On Site.

SCENARIO 7

What an impression you've made! You're doing a bang up job and Al is very impressed.

So far you have:

- Completed the Primary and Workflow Setup

- Customized a number of features specific to your shop's needs.

- Added new customers and vehicles and can search for both.

- Performed the six basic steps to create an estimate

- Created a Custom Job with an exact price and/or a fixed price.

- Created and added symptoms and work descriptions

- Added parts and labor to Work document

- Deferred a job and sent a deferred work reminder message

- Used the Scheduler and WIP screen to track Repair Order

SECTION 7

FIND OUT

- ## How to create and process an invoice
- ## How to create and send service reminders

QUICK TIP

- **Create reminder types for major service intervals for 30, 60, 90, & 120 thousand miles. Identifying these service reminders on the repair order will encourage customers to return to your shop for the major service work.**

PROCESSING AN INVOICE

Overview

Estimates and repair orders may be modified and saved, or turned into Invoices at a later time. Both of these options will immediately display a printable PDF document. However, once marked as paid, Invoices are final and cannot be modified.
Make sure to fill in/confirm all fields in the Invoice Confirmation popup window.

Creating an Invoice

From the **Work** screen, click **Invoice.**

Select **Pay, Pay Later** or **Invoice Draft** to close the Invoice.

Pay
Confirms payment has been collected based on selected Method.

Pay Later
Finalizes the invoice, but sets the total as an outstanding balance.
Outstanding balances can be viewed in the Customer Statements report and Aged Balances report.

Invoice Draft
Displays a preview of the Invoice before it is finalized.

Invoice Confirmation Screen

IMPORTANT!

The "Assign Sales Class to invoice" drop-down box is best left blank so that each item on the invoice will default to the Default Sales Class Code that you previously assigned to it.
If you make a selection in this drop-down, it will assign the selected Sales Class to the ENTIRE invoice.
This will create accounting problems if you export data to QuickBooks.

SECTION 7

CREATING AND SENDING REMINDERS

Message Customers and Keep Them Returning

Reminders are a great way to alert you to customers' service and maintenance needs and helps you reach back out to customers to ensure they return to your shop and not someone else's!

Reminder Types

Before assigning a reminder to a vehicle, you must create reminder types.

Click **Setup** >> **User Options** >> **Reminder Types.**

Enter a **Reminder Name** >> click **Update.**
Example: Oil Change, Air Filter, Timing Belt Service.

A pop-up box will appear >> click **OK.**

Note: All existing Reminder Types will show in the **Customer Relationship Manager** drop-down list.

User Options & Settings

- Options Home
  - General
  - Emailing
  - Printing
  - Company Info
  - Schedule
  - Document Footer
  - Reminder Types
  - Messages
  - Access Control
  - Housekeeping
  - Pricing
  - Default Sales Class Codes
  - Inspection Schedule
  - Opening Balances
  - Shop Supplies
  - Invoice History Export
  - QuickBooks
  - Catalog / E-Business
  - Intuit Demandforce
  - myCARFAX
  - MechanicNet
  - Card Payments

Reminder Types
Current Reminder
Timing Belt

Reminder Name
Timing Belt   ☐ Auto Update due date
Delete

Update   Cancel

Reminder Types Setup

Assigning a Reminder to a Vehicle

From the bottom-right corner Work screen, type in a date (mm/dd/yyyy), or select a date by clicking in the calendar icon
> click **Update**.

Reminders can be entered for one or more categories.

A reminder date highlighted in yellow: The reminder date is within 30 days.

A reminder date highlighted in red:
The reminder date is overdue.

Reminders

Inspection	01/21/2016
Service	07/30/2016
Timing Belt	07/28/2017

Update

Reminder Types on Work Screen

SCENARIO 8

Al is very pleased with the work flow you're developing. You're making this Manage Online stuff look easy!

Al tells you that the ALLDATA rep had demo'd this CRM thing and it sounds like a great way to make sure customers keep coming back to the shop for other services.

Al says seems interested in marketing more to his customers and wants you to look into what he can do to market the shop to his customers for service specials and additional service work.

SECTION 8

FIND OUT

- How to use CRM to send email and text messages to small & large groups of customers
- How to track marketing campaigns

QUICK TIP

- Before emailing and texting customers it's important to set your own email as the default sender and make sure all your text messages include your own shop phone number

SECTION 8

CRM: CUSTOMER RELATIONSHIP MANAGER

Creating and editing messages

Before using the Customer Relationship Manager, you must first create messages.
Click **Setup** >> **User Options** >> **Messages.**
Select **Reminders** >> Write a brief description.

• **Reminders:** Messages that remind customers about a service.

• **General: Messages** such as "Welcome," "Thank You," "Service Specials," or "Vehicle Ready."

• **Brief Description:** Title or description of the message.

Write a Text Message and/or Email Message. Make a selection from the drop-down menu to insert customer information from your database.
Example: Dear [TITLE] [FNAME] [LASTNAME],

Note: The Text message is limited to 160 characters and emails can be up to 700 characters.
Click **Add** >> Click **Update**
The messages have been updated >> click **OK.**

Reminder Message

CRM: CUSTOMER RELATIONSHIP MANAGER

Sending Messages to Customers

Using the Customer Relationship Manager (CRM) to send messages to customers increases productivity and business by informing customers of vehicles that are ready, important service intervals, and special sales your shop might be running.

Click **Reports** >> **Customer Relationship Man.**
Search for customers by **Type**:

REMINDERS
Select a **Reminder Type** >> **Date From** and **Date To** >> click **Display.**
Note: Not selecting a date range will display all customers with reminders of that type.

Select a **Contact Method** and **Message.**
Once a Message is selected, the message text will appear in the box
Select the customer(s) you would like to contact >> click **Send.**

CUSTOMER LISTS
To search for customers, you may do one or more of the following:
Enter a **Start Account #** and **End Account #**
Select **All Customers, Manual Customer** >> **Search**
Select a date range or select a **Customer Type** >> click **Display.**
Select a **Contact Method** and **Message**
Select the customer(s) you would like to contact >> click **Send.**

VEHICLE LISTS
To search for vehicles, you may do one or more of the following:
Select **All Vehicles,** enter information in **Manual Vehicle Search**, search by Year, Make, Model and Engine or search by a date range >> click **Display.**
Select a **Contact Method** and **Message** >> select the customer(s) you would like to contact >> click **Send**.

DEFERRED WORK
Select a **Date From** and **Date To**, or make no selection to display all >> click **Display.**
Select a **Contact Method** and **Message.**
Select the customer(s) you would like to contact >> **Click Send.**
A pop-up message will appear >> click **OK**

SECTION 8

TRACKING MARKETING CAMPAIGNS WITH MEDIA CODES

Media Codes setup

Media codes in Manage Online allow you to track customer marketing activities and the effectiveness of the marketing campaigns you choose for your shop.

To setup media codes:

Click **Setup** >> **Codes** >> **Media Codes**.

Enter a **Code** and **Desc** >> click **Update**.

Code: One to four alpha-numeric characters that identify a code within the program. (Example: NEW)

Desc: A description of the media code. (Example: Newspaper)

Media Codes Setup

Using media codes

Media codes can be collected from either the Work document or during invoicing.

From the Work screen:

Click **Options**
Select **Media Code** from the drop down menu
Click **Update**
From the **Invoice Confirmation** screen: Click **Invoice**
Select **Media Code** from the drop down menu
Select and enter appropriate information to complete the invoice

Media Analysis Report

Click **Reports** >> **Analysis Reports**
Go To **Media Analyisis** in the scroll down
Choose a **Date From** and **Date To**
Select **Summary** or **Full**
Click **Display**

Summary: Shows number of invoices associated with particular campaign or code.
Full: Shows a list of each invoice associated with a campaign or code by invoice number.

Turnover by Media Code

Go To **Turnover by Media Code** in the scroll down
Choose a graphic chart to display the cummulative results over one to four years
Select a **Chart Type**
Click **Display** after each selection

FINAL EXERCISE

Those messages you've been sending out to all your customers must really be working!

Mrs. Ashleigh was so happy with the service you provided she's returned to get repair work done on her husband's Corvette.

Follow the prompts on the next page to create Mrs Ashleigh's job.

Use the links to articles and videos in the previous pages to remind you how to perform different tasks.

As always, you can use the customer and vehicle information suggested or use ones that are relevant to you.

Remember, you can always delete a customer and/or vehicle record if you're working in your new Manage Online database.

FINAL EXERCISE

GETTING STARTED

- Look up your customer's address and contact details and then add the new vehicle information from the work screen.
- Need a reminder of how to do that? Check out this article 📑

QUICK TIP

- For this final exercise, choose your own customer and use the vehicle details below:
- 2009 Chevy Corvette ZR1 6.3 Coupe
- Standard Transmission
- License: 7NYB225
- Mileage: 40,934

FINAL EXERCISE

- Add and confirm Mileage in 40934
  Symptoms – "Customer states battery not keeping charge".

- Add "Low Charge" symptom with description as "Dead/Low Battery. Alternator light on or gauge reading low" to the work doc and save for future use.

- Select DTC. P0562. **Enter >> Add >> Done**

- Add a **Service Writer** of your choice

- **Add Job >> Custom Jobs >>Diagnosis & Inspection** category
  Select the Global Custom Job for **Diagnostic-Electrical**
  Click check box and **Add Selected**

- Assign a **Technician** of your choice

**The Corvette was due for an oil change.
The customer agrees to add the lube, oil, filter.**

- **Add Job >> Custom Jobs >> Fluids & Accessories**
Select the Global Custom Job for Synthetic Oil Change
Under AutoZone tab click Oil Filter link
Select an oil filter
Click **Add to Document**

The Corvette takes a lot more oil than a standard vehicle.

- Edit the Synthetic Oil Change job to increase oil quantity to 11. Click **Update**

- Create Estimate. Print the Estimate and/or email it to yourself for confirmation

Ms Ashleigh agrees to the work and you begin the repair order. Authorize if enabled.
- Create R/O

Your tech finds that the alternator is defective and the positive battery cable needs replacing.

- Add this new found fault to advisory notes

- Add an alternator, belt and a positive battery cable to the job from the AutoZone catalog or catalog or your choice

- Click OEM tab to acces Labor

- Under Linked Part Categories choose the links to add labor for each part

- Add to Document

- Update R/O

- Print Technician Worksheet and/or Print Customer R/O for confirmation

Note: Pricing for this job may not reflect real world pricing and is for exercise purposes only.

While doing the courtesy inspection, your technician discovers that the front brakes and rotors need replacing.

To give the customer an estimate for this job, let's add it to the work document. We'll get these brakes from a non-electronic parts vendor. Make sure you have previously created a vendor for these parts.

If you'd prefer to practice ordering these parts from an electronic parts vendor, repeat the previous steps.

FINAL EXERCISE

Create Brake Job

- **Add Job** >> **Blank**

- Enter **Description**: Front disc brake job

- Select **Technician**

- Click **Update**

- Click **Add item** >> **Inventory Parts**

- Enter Part information below

After contacting the parts vendor for the front pads and rotors the vendor gives you this information.

Line Code: BRK
Choose **Auto Line Code** if lines codes have not been created

Part Code/Number: D0731
Description: Baer Sport Ceramic Brake Pads
Cost: 46.99
Sell: 99.00
Quantity:1
Vendor: Choose a Supplier
(Remember how to add a Supplier?)

- Click **Add To Document**

Line Code: BRK
Choose **Auto Line Code** if lines codes have not been created

Part Code/Number: 55043-020
Description: Slotted Brake Rotors
Cost : 176.22
Sell: 249.99
Quantity: 2

- Click **Done**
- From Quick Parts Add 2 cans brake cleaner and 1 bottle of Brake Fluid to job

Note: If you have not added these parts to your inventory, you can add them now

FINAL EXERCISE

- Click the **Add Item** button on front disc brake job

- Click OEM **Labor Times**

- Enter keyword "**Brake Pad**" into Search or use left side navigation

- Add OEM labor for front brake pads
  Scroll down to add labor for removing and replacing rotor.

Note: Make sure to add enough labor for both sides.

- **Add to Document**

- **Update RO**

After contacting the customer they decide to defer the brake job.

- Click the **RED X** at the Front Disk brake job grouping

- Defer the job- Select a **Due Date**
  Choose a **Reason**
  Choose **Deferred By**
  Click **Defer**

- **Update R/O**

- Print and/or email the R/O for confirmation. Your R/O should look something like this:

Printed Repair Order

FINAL EXERCISE

- Click **phone icon** on work document

  Send **Text** "Ready for pick up"

- Confirm **Mileage out**
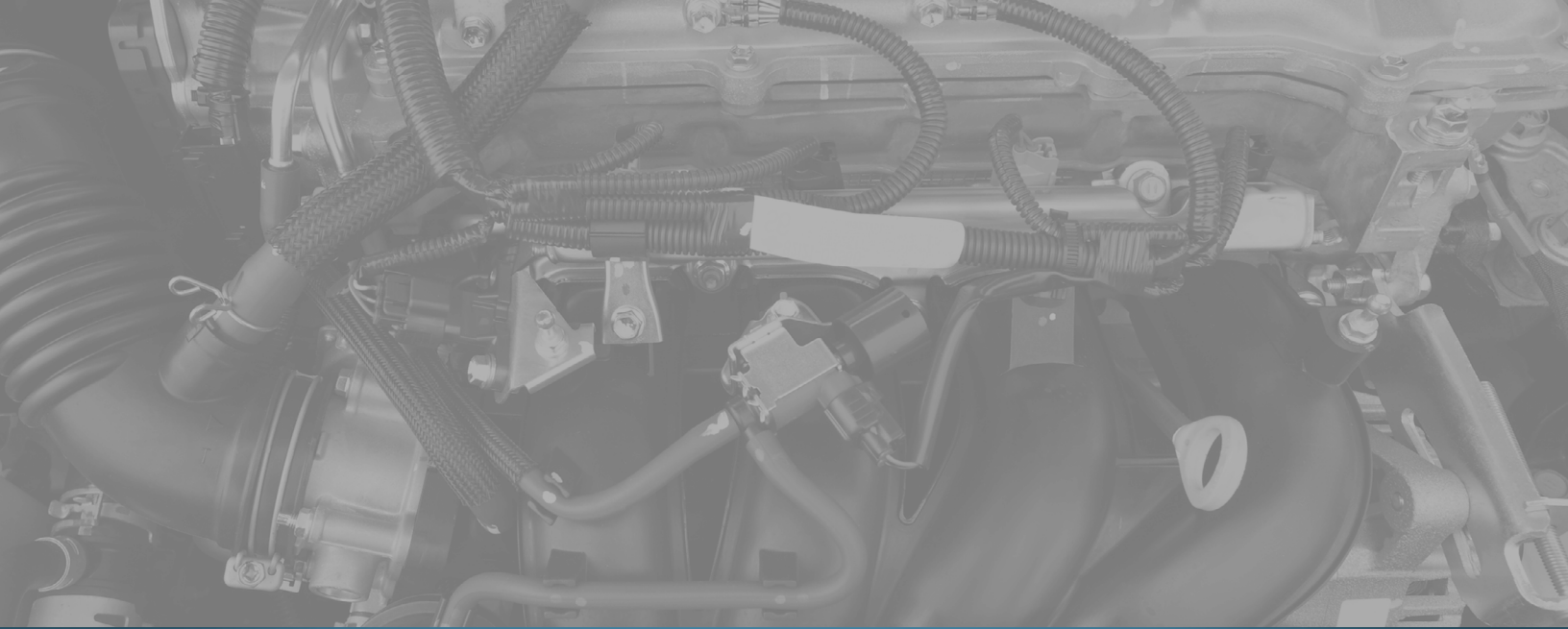
- Click **Invoice**

- Select a payment method

- **Pay**

- Print Invoice

- Clear All

	Code	Description	Check Stock	Sell	Qty	Disc %	Tax %	Total +Tax	Actions
⚙									
∧	+ Item ↑ ↓	Diagnostic - Electrical						90.10	••• ✕
	Work Description	Diagnose electrical malfunction of vehicle based on customer report and observations....more							••• ✕
	LAB1	Shop Labor		85.00	1.0	0.00	6.0	90.10	••• ✕
∧	+ Item ↑ ↓	Synthetic Oil Change						33.37	••• ✕
	Work Description	Perform Synthetic Oil Change using the correct Synthetic Oil and premium filter types based...more							••• ✕
	LAB1	Shop Labor		85.00	0.3	0.00	6.0	27.03	••• ✕
	AAASYN5W30	Synthetic Engine Oil 5W30		0.00	11	0.00	6.0	0.00	••• ✕
	CHLS10060	Oil Filter		5.98	1	0.00	6.0	6.34	••• ✕
∧	+ Item ↑ ↓	Alternator						662.88	••• ✕
	LAB1	Replace - Alternator		85.00	0.8	0.00	6.0	72.08	••• ✕
	LAB1	Replace - Battery Cable - Positive Cable		85.00	0.9	0.00	6.0	81.09	••• ✕
	DURDL2344-6-9	Alternator		389.98	1	0.00	6.0	413.38	••• ✕
	DURDL2344-6-9	CORE - Alternator	⟳	35.00	1	0.00	6.0	37.10	••• ✕
	ELB4040400	Belt		27.90	1	0.00	6.0	29.57	••• ✕
	AZBDL07765	Battery Cable		27.98	1	0.00	6.0	29.66	••• ✕
		Shop Supplies		14.84	-	0.00	6.0	15.73	
		Hazmat			0	-	-	0.00	

Planned Hours 0.00

Sub Total	756.68
Tax	45.40
Total	**802.08**

Completed Repair Order

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February 2020