Shop Controller

Professional Service Management System

8.0

Alliance Automotive Software
310 E. Southern Ave.
Mesa, AZ 85210
www.shopcontroller.com

Alliance Computer Services, Inc policies are available for the US/CANADA of this product (as indicated by the disk label) if purchased or used outside the United States and Canada

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Technical Support for the Shop Controller software shall be provided in accordance with the Annual Service Agreement. These Technical Support terms are subject to change without notice.

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Alliance Computer Services Inc. Software Lease Agreement

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WELCOME TO SHOP CONTROLLER 8.0

Today's Automotive Service market is a very competitive environment. Shop Controller can give you an edge, can save your hard earned money, and can help to increase your revenues and profits. All of this and also make it easier for you to run and control your business.

Shop Controller 8.0 has been established as a superior software service management system. It is very powerful, yet practical. It is easy to learn, fast in operation and very easy to use. ACS Automotive Software is very proud to introduce Shop Controller 8.0 Professional Service Management System.

HARDWARE / SOFTWARE REQUIREMENTS

Minimum Requirements:

Intel Pentium CPU 1.50Ghz
1 Gig RAM (2 Gig RAM if you are using Vista OS)
1 Gig free hard disk space
Inkjet or laser printer
Microsoft Windows 2000/NT/XP-Pro/Vista Operating System

Recommended requirements:
Intel Pentium CPU 2.00 GHz or greater
2 Gig RAM or greater
1 Gig free hard disk space
Laser printer
Internal Zip drive/USB flash drive
Microsoft Windows 2000/NT/XP-Pro/Vista Operating System

Installation

You must already have a Windows operating system installed on your computer before you can install the Shop Controller system.

Please follow the Installation steps exactly as listed:

1) Insert Shop Controller installation CD into your CD-ROM drive.

2) Installation should automatically start. If it does not, go to Start Menu - Settings - Control Panel - Add/Remove Programs then Click on the Install Button. Installation will then begin.

3) The on screen instructions will guide through the installation of the software.

4) To complete installation, restart your computer.

Setting Up Your Management System

The program you have received comes with an empty database. This will require you to enter information into the program order to operate it. Begin by going to the help menu, select the "Quick Start" link and print This document. It will guide you through the setup process.

The following is a list of Setup Menu areas and their definitions. Follow through each item and enter the appropriate information. After entering the information into the Setup Menu, do the same for the Supervisor Menu.

COMPUTATIONAL is where you enter your labor rates, shop charge rates and tax information.
Click on the button for Canadian Taxes if applicable.

SYSTEM DEFAULTS are your most common city, state and zip code.
DISPLAY1 will display your W/O listing by W/O # and Vehicle info.
DISPLAY2 will display your W/O listing with the customer name as well.

OUTSIDE PURCHASE DEFAULT: Check this box when your parts are usually purchased from a vendor. When you are in the Work Order Entry screen, it will automatically check the accounting information box as an Outside Purchase. This will create a payable in QuickBooks TM.

ARCHIVE DEFAULT: Check this box if you want every new part entered to be listed in your inventory when the W/O is closed out. You will have the option to uncheck this option for each individual part entered.

AUTOMATIC BACK UP will automatically back up your program at closing. Please obtain a flash drive, copy the install file and select the flash drive as the backup. If there is a problem, the install file and the backup files will be in one place. Please verify backup daily.

BACKUP SETS is 1-7 this is the number of days you want to backup.

INCREMENTING will allow you to start with the next W/O # in sequence with what you already have. This is the same with the customer #'s as well. After putting in use, it can only be set to a future number.

TECHNICIANS : Where you enter your technicians computational setup. The average number of hours worked per day is for the scheduling.

GROUPS : These are categories for your parts and labor. You can add or subtract any of these as needed. This will come in handy later when you are looking up parts and labor.

VENDORS: Enter your vendors that you get your parts from. Note: Do not use apostrophe's commas or asterisks in this field.

PAY TYPES are different methods of payment. You can add or delete any of these as well.

REFERRAL TYPES are where you get your business. Examples are Yellow Pages, Friend, Coupons and such.

DIRECTORY GROUPS is like a phone/vendor/ directory . You can add employees and vendors to the directory through the EDIT button at the main screen.

PRINTER SETUP
Please select the radio button to the left of Printer1 first, and to the right you will click on the printer. This will be verified below the PRINTERS box. It will read PRINTER 1 will print to "*printer name*" Click on the SAVE PRINTER SETUP button and the printer options tab will appear. Check to insure that each document is assigned to a printer and that the desired number of copies for each document is chosen. Then Click SAVE DEFAULTS.

PRINTING RELATED this has 5 buttons

1) Is the PRINT CUSTOMER LABELS for Fleet or Regular Customers. Note: This will print as soon as you click it, (Don't click until you're ready) it uses AVERY 5160 labels.

2) Is the AUTHORIZATION STATEMENT this comes with a default statement and is editable.

3) Is the RECEIVE BOX INFO this is editable too.

4) Is the INFORMATION BOX STATEMENT, again is editable.

5) Is the HEADER INFO, Box 1 is Business Name, Box 2 is Street Address, Box 3 is City, State & Zip, Box 4 is phone # And/or Fax#. This is what will be on your header in your invoices. Please call us if you need to put your logo on the invoice. We can also do custom programming on the invoices.

ACCOUNTING: is used if you will be using QuickBooks TM. Please refer to the help section on setting up QuickBooks TM.Quickbook users using version 2005 and newer will need documentation for the new updated versions.

TOOLBAR allows you to rearrange the toolbar on the main screen. You may add/remove buttons as you see fit. You can also turn it off.

The next area to setup is the **Supervisor Menu**. Select MENUS then SUPERVISOR MENU

INVENTORY REPORTS displays your inventory status etc.

CASH REGISTER shows all transactions that go through Shop Controller. Transactions can be added or edited.

USER LISTS allow you to set up passwords in the program for security. Click on User List, Enter the Password Administrator (you) then your password (passwords are case sensitive). Save. Click Add User To List. Set up user with password and check the areas that this user will be allowed to access.

COMMISSIONS you can set up your techs commission rate or hourly rates to track your profit with. Highlight Tech's Name, Click Commission Set up Button. Enter the Tech's Rate by percent Hourly Flat Rate or Book Hour Rate then SAVE. The commission report is generated from the closed work orders only. To Run Labor/Parts Commission Report: choose date range and click on appropriate button.If you need this to be explained further, Call support.

QUICKBOOKSTM view your transactions and export them to

RECEIVEABLES allows you to close out W/O's that will be paid at a later time, it will become a receivable. Click on the Payments and Charges button to go to the Receivable Listing, this is where you will view, edit and enter payments. Highlight the customer, click on Select button.

This will take you to the Receivable Detail screen. To enter a payment or charge, click on Account Activity button. Click on Enter Transaction button. Record transaction and SAVE. Click on the Receivable Aging Report button to access the aging report. Or Print Statements for all Receivables.

After your have gone through and entered information in these two areas you can begin to use Shop Controller 8.0. You can enter W/O's "on the fly". Enter New Customer, Vehicle, Labor and Parts to a work order. When you close out the W/O, the program will automatically drop the customer info, vehicle info, and parts information to the history listings and to your inventory list to be used again.

Although you can operate the software in this “enter as you go” manner, it is recommend that you invest the time to enter your inventory and labor before hand and apply these preset items to each work order.

LABOR TABLES

Labor Tables are pre-defined labor charges and descriptions for quick and automatic insertion into Work Orders when needed.

VIEWING LABOR TABLES

To view your labor table listing, choose LABOR from the main control menu.

ENTERING LABOR TABLE

Choose LABOR button from the main control menu toolbar then ADD TABLE. then Enter a Unique Code for Labor Table field. Example: (L.O.F for Lube Oil and Filter). Enter a complete description of the job in the description field and choose either a Flat Charge for Service or Hours for Service.

Choose the appropriate Group. If job applies to one of the Scheduled Services check the box for the appropriate scheduled service. When you check this box, it will queue the marketing area of Shop Controller to send out service reminders for that service.

When finished press the Save button. If more than one labor table is desired, click on the Save + button.

INSERTING A LABOR TABLE INTO A WORK ORDER

From the work order entry screen, choose LABOR from the menu, located at the top of the screen. Start by entering the Labor Table Code and the information will be displayed, or you can press the magnifying glass and search the listing of labor tables. When the desired labor is located in the list, double click to insert the information into Labor Table blank field. Press the SAVE button.

TIP: To speed up your search, press the letter or number key for the first letter in the Labor Table Code.

The proper Labor Table will be highlighted. Press letter or number as needed if there are multiple codes, with the same letter or number. The Labor Table can be changed to suit this work order; changes will be effective for this work order only.

Entering INVENTORY

To enter an item(s) into your inventory, click on the inventory button from the Main Control Menu; choose ADD INVENTORY from the Inventory Listing window. Enter the Part #, Part Description, Location (this is where it would be stored in the shop), Manufacturer. Choose the appropriate Group. Then enter your cost, apply your Parts Mark Up % or enter a Unit Price. Then choose the Vendor (vendors must be entered from the Start Up Menu before they will be listed here).

Enter all the pertinent Inventory information. When you are finished entering the information, you have three choices for saving the information.

SAVE
Saves the Inventory information and returns you to the previous screen.

SAVE +
Saves the Inventory Item information but displays Inventory Item Entry screen with blank fields, which allows you to enter another Inventory Item.

SAVE + KEEP
This will save the inventory item information entered and display a new inventory item entry screen, which is completed except for a blank Part Number field. This allows you to enter multiple parts number that has the same or similar part description.

To view items currently entered into inventory click on the inventory button from the Main Control Menu. This will show your Inventory Listing. A single click on the headings Part Number, Description or Vendor will automatically display the list either numerically or alphabetically according that heading.

SERVICES SETUP

Services (canned jobs) are a very powerful tool that allows you to build Service Kits. Service Kits contain Parts, Labor Tables, as well as a description of the work to be performed for a particular service. These can then be saved and inserted into a work order when needed. This tool will save you a great deal of time on every work order you prepare daily.

NOTE: Parts and Labor must be entered into the system before you can create the Services.

CREATING A SERVICE

Choose SERVICES from the Main Control Menu. A Services Listing screen will be displayed. Click on Add Service button to create a new Service. Enter the Service Name, Description and Work to Do Description. You can enter both the Labor Tables and Parts in the appropriate boxes, or you can automatically retrieve them from your Labor and Parts file.

NOTE: You cannot create a service until you have entered parts and labor into your system.

SERVICES PART ENTRY

Choose ADD PART to SERVICE from the Service Information Entry screen. Click on the magnifying glass to go to an Inventory Search Screen. Double click on the Part wanted and it will automatically be inserted in the Service Information Entry screen, then enter the quantity. Click on the **SAVE** button.

SERVICES LABOR ENTRY

Choose ADD LABOR to SERVICE from the Service Information Entry screen. Click on the magnifying glass to go to the Labor Table Search List.

Entering a CUSTOMER

Click on the CUSTOMER button from the Main Control Menu. You will be given the option to enter a FLEET CUSTOMER or REGULAR CUSTOMER. Fleet Customers have the option to have their own labor/tax and discount rates. Regular and Fleet Customers will use the default settings you listed earlier in Computational unless otherwise specified.

NOTE: A Regular customer is billed at Regular Labor rates 1, 2,or 3 and default Tax Rates.

Choose Regular Customer. At this point you will have the options to ADD

CUSTOMER, DELETE CUSTOMER, or EDIT CUSTOMER. Choose ADD CUSTOMER.

Enter all of the pertinent customer information. When finished, press the SAVE button and the customer information will be added to the customer file. You may also choose to enter the customer's vehicle information at this point as well. To do so choose SAVE AND ADD VEHICLE (see vehicle entry below for further information)

ENTERING A FLEET CUSTOMER

> NOTE: A Fleet/Non-standard customer is billed at user defined Labor Rates and Tax Rates or automatically set at default rates. (Labor and Tax Rates are customized for each individual customer)

Choose Customers from the Main Control Menu and then FLEET. At this point you will have the options to ADD CUSTOMER or DELETE CUSTOMER. Choose ADD CUSTOMER.

Enter all of the pertinent customer information. When finished, press the SAVE button and the customer information will be added to the customer file.
You may also choose to enter the customer's vehicle information at this point as well. To do so choose SAVE AND ADD VEHICLE (see vehicle entry below for further information)

VEHICLES

VEHICLE LISTING

When you click on Vehicles you get the listing screen. A single click on heading except Unit Number will automatically display a list setup either numerically or alphabetically according to that heading. All vehicles entered either through the work order entry screen, or from the customer entry screen, will appear in this listing

VEHICLE ENTRY

You can reach the Vehicle Entry Screen by choosing SAVE AND ADD VEHICLE from the customer entry screen or by choosing VEHICLES from the main menu and then choosing a vehicle from the list to edit.

Enter all of the pertinent vehicle information. Put any notes into the NOTES section and they will appear in the NOTES section of the work order. These notes are for the technicians/service writer and will not be printed on any customer invoices.

When finished entering the information either :Save (which saves the

Vehicle information and returns you to the Main Control Menu) Or SAVE + (which saves the Vehicle information but also will display a new Vehicle Entry screen with blank fields. This will allow you to enter another vehicle for that customer)

Entering WORK ORDERS

Click on the WORK ORDER button. Click ADD WORK ORDER (if you have fleet customers in your database you will be given the option to choose Regular or Fleet Customer). You can enter a Work Order "on the fly" (new customer, new vehicle and all other information for Regular Customers only, Fleet Customers are set up differently for their individual rates) or you can use existing customer and vehicle information. When you enter a Work Order "on the fly", the information from the W/O will be saved in History and in the listings.

TIPS

Choose a previous customer and/or vehicle from the listings by clicking on the Magnifying glass.

Double click in the Vin # box or the make box to get a listing of the vehicles.

Select the Technician. Enter the Service Writer, and the Promised by date or time.

Work To Be Performed is where you would type the customer complaint.

Now add Parts and Labor or Services, Towing and Sublet to the W/O by selecting them from the top of the screen. You can add new parts or labor "on the fly" from here if needed.

Service Recommendations are suggestions you have made to the customer for work to be done at a later time.

The Special button is where you will apply any discounts; see your profits and other functions. Import is where you would import an existing Alldata™ Estimate to Shop Controller.

Add Sublet work or Towing if needed.

Choose Print button to print Shop Work Order, Final Invoice, Pre Printed Invoice or View Final invoice.

Closing. Click on the Closing button to add payment and close out the W/O. Shop Controller will give you the warning that Closing Is Not Reversible. If you are ready to close then go ahead and close.

Once a W/O is closed out it can be located and reprinted in the HISTORY button from the Main Control Menu or the EDIT button located at the top of the MAIN CONTROL MENU.

SAMPLE OF JOB FLOW

There are a couple of ways that an actual job flow of activities could take place in a workday. The following steps will outline the most likely sequence of events. For the purposes of this sample, let us assume that the customer has called you on the phone to schedule a time that he/she can bring a vehicle in to be repaired.

Schedule Appointment

Go to main control menu, click on Scheduler Icon, click on appropriate date. Click on Add Appointment. Enter appropriate customer, vehicle, time, etc.

Create Work Order

Note: If this customer is an existing customer, the fields will automatically fill in.

Complete Work Order

The customers specific work order is now displayed. If this is a new customer, the only information that will be displayed is the information that was entered when you scheduled the appointment. Enter any additional information that is required that was not input when the appointment was made. Enter the Work to be performed in the appropriate box. Enter tracking information: writer, technician, phone, time or date promised by. Service Recommendations can be filled in for future services. Click on Print to access print dialogue box. Click on Shop Work Order (1 copy). Work Order will print for shop use only, and should include customer signature for authorization.

NOTE:

Following your normal procedures, diagnostics and parts pricing should create the necessary information to enter the parts and labor information into the work order. Gathered information should be entered on the Printed Work Order. When completed, the Printed Work Order will be returned to the person who is responsible for entering information into Shop Controller.

Inventory Entry

Go to Work Order Entry screen. Click on Parts in the main menu. Enter pertinent Inventory information. If more than one part is being entered Press SAVE+ button.

Labor Entry

Go to Work Order Entry screen. Click on Labor in the main menu. Enter pertinent Labor information. If more than one labor item is being entered Press SAVE+.

NOTE:
If the customer requires a written Estimate prior to completing the work, you will need to complete Estimate Entry screen instead of a Work Order screen and then Convert the Estimate to a Work Order.

Create Invoice

Go to Work Order Entry Screen and check all pertinent information for accuracy and completion of service. Click on Print in Main Menu and select appropriate Print option.

Shop Controller Main Control Menu

Menu Bar

Customize toolbar (Add/Delete toolbar buttons): Click on Menus - Setup Menu - Toolbar to add or delete buttons.

EXIT: Will exit from the program and automatically create a backup of the database to the drive specified from the Utilities Button.

EDIT: Choose to edit Customers, Directory, Estimates, Inventory, Labor Tables, Services, Work Orders, Work Order History, or Vehicles.

TOOLS: Option to use the Scheduler or the Calculator.

MENU: Option to view the Supervisor or Setup menu

UTILITIES: Option to Backup the database, do a Database repair, Clear the table of open Invoices, or Clear the default table in the database.

HELP: Option to view the HELP Program, Quick Start and automated tutorials

MARKETING SYSTEM

A very important part of building and maintaining a loyal customer base is to communicate with them. A great way to stay in touch with your customers and increase your revenue and profits at the same time is to use the powerful Marketing System of the Shop Controller.

MARKETING SYSTEM SETUP

NOTE:

It is vitally important for you to remember that when you initially set up the Marketing System, you must first have Service Data recorded or saved in the appropriate fields. In order to alert the Marketing System to work, you must click on the appropriate box in the Scheduled Service box in the Labor Tables. If you do not do this, the system will not print reminders. You only have to do this once per customer.

There are three different types of Marketing Information that can be utilized. Post Card Service Reminders (Avery 5389 Post Cards), Mailing Labels.

Mailing Labels (Avery 5160 Mailing Labels), and the Report Form. When you are generating information for the Marketing piece to be sent to the customer, make sure all of the inquiry date ranges are correct. Choose the proper Format Type and select the Vehicle and Customer as additional criteria.

LETTER INFORMATION ENTRY

By clicking on Letters Setup in the Marketing System display screen, the Letter Information Entry screen will appear as displayed to the left. Enter the appropriate Marketing message, in the Letter Information Entry box. Press the SAVE button.

GENERATION CONTROL

By clicking Generate Mailings in the Marketing System display screen, the Generation Control screen will appear as displayed to the left. Click on the appropriate letter button to print.

NOTE:
The standard letters that can be generated are, Oil Changes, Tune Up and Brake Jobs. Two User Defined letters can be created and tracked.

ALLDATA™ INTERFACE (Works with disks only)

From Shop Controller you can either import an estimate created in ALLDATA™ into a Work Order, or import just parts and labor into an estimate. Before either can be performed you must setup the ALLDATA™ Importer.

ALLDATA™ IMPORTER

To bring an estimate into the Work Order entry screen, first fill in customer information before importing the estimate. From the Work Order Entry Screen, choose IMPORT from the menu, and then choose ALLDATA™ Importer. Click on Setup to set path to ALLDATA™ files. Find the ALLDATAW directory on your computer, typically (C:\ALLDATAW) then double click on the Estimate folder, and then SAVE. When you click on save, the ALLDATA™ IMPORTER window will display your ALLDATA™ estimates.

> NOTE: ALLDATA™ estimates do not bring cost of parts and labor into the work order. Only customer price is provided by ALLDATA™.

MITCHELL INTERFACE (Works with disks only)

Mitchell™ Parts & Labor can be imported into a Shop Controller estimate from the ESTIMATE ENTRY SCREEN. Place your Mitchell™ VME CD into your computer and then choose Estimating from the menu, then Mitchell.
Estimating. You must have the VME CD in the CD-ROM drive anytime you want to import Mitchell™ information.

> NOTE:
> When importing Mitchell™ there is NO cost data imported, only price.

QuickBooks™ Setup (up to version 2005) * see notes

Shop Controller can export transactions to QuickBooks™ to facilitate record keeping. The following six steps will guide you in setting up QuickBooks™ to interface with Shop Controller.

Step 1: The path of the QuickBooks directory must be setup in Shop Controller. Determine the path of the QuickBooks ™ directory. Go to Menus ~ Set-up Menu ~ Choose the Accounting button. Click the button at the top of the screen “Generate QuickBooks Accounting Information”.

Then select the default directory path:

For QuickBooks ™ Pro the path is C:\Program Files\Intuit\ QuickBooksPro
For other Versions, you will need to determine the path.
TIP: To determine the correct path to QuickBooks™, go to the QuickBooks™ icon located on your desktop. Right click on the icon and choose properties. The target window will show the correct path.

> NOTE:
> If you are running Shop Controller on a network, QuickBooks™ has to be installed on the server where the Shop Controller database resides. The QuickBooks™ Export has to be executed from this server.

Step 2: From the main tool bar click on the QuickBooks™ button. If there is no QuickBooks™ button, choose menus ~ Supervisor Menu ~ QuickBooks. QuickBooks™ will need to know the chart of accounts in order to correctly read your transactions. Click the EXPORT ACCOUNTS button that is located in the top right corner of the Accounting Transaction window. This will create a file named **shopAcc.iif,** and places it in the QuickBooks™ directory that you set up in STEP 1.

Step 3: If there are transactions to be exported they can be exported now by clicking on Export Transactions. This will place the transactions into a file called **ashopc.iif** and places it in the QuickBooks™ directory that you set up in STEP 1. At this point you can go to QuickBooks™ by clicking on 'Go to QuickBooks'

Step 4: Compare the Chart of Accounts in QuickBooks™ with those of Shop Controller (See Table 1). The accounts in QuickBooks™ should be the same as the accounts in Shop Controller if the account is listed in QuickBooks™ already. If the accounts do not exist they will be created in

Step 5.

NOTE:
The account type should be changed if it does not match that of the account in Shop Controller.

Step 6: The Shop Controller Accounts can now be imported into QuickBooks™.

NOTE: This Step is only necessary when setting up the company interaction with Shop Controller for the first time.

From QuickBooks™ choose File ~ Utilities ~ Import ~ Import IIF Files... choose the **shopAcc.iif** file and Open. The Accounts will be imported into the QuickBooks™ Chart of Accounts. If you receive an Error refer to QuickBooks™ Import Errors.

Step 7: Now that the accounts have been imported into QuickBooks™, you can import your Shop Controller transactions. Choose File ~ Utilities ~ Import ~ Import IIF Files... choose 'ashopc.iif' and Open. This will import the transaction information from Shop Controller into the appropriate account(s) in QuickBooks ™.

<u>Warning: ashopc.iif should be imported only once each time it is exported from Shop Controller, each time these transactions are imported, they are added to the accounts. After This Initial Setup is completed import transactions is Step 3 and Step</u> 6.

QuickBooks™ Import Errors

Error - (You can't change the Type of a name or add a duplicate name)
Solution - Look in your list of Customers, Vendors, Employees and Other Names. The same name cannot occur in more than one list. If you receive this error, change the names accordingly and import **shopAcc.iif** again. Continue this procedure until **shopAcc.iif** is imported without error.

* Quickbooks version 2005 or newer requires new documentation. Please call support for updated documentation. 800.898.2038

NOTE:
Do not to Import 'ashopc.iif' until 'shopAcc.iif' is imported without error.

Please see the updated help menu in the menu bar in ShopController.

TABLE 1

Account Names	Account Type
Accounts Receivable	Accounts Receivable
Accounts Payable	Accounts Payable
Cost of Goods Sold	Cost of Goods Sold
Inventory	Other Current Assets
Cash Register	Bank
Sales Labor	Income
Sales Parts	Income
Sales Sublet	Income
Sales Towing	Income
Sales Shop Charge	Income
Inspection	Income
Sales Tax Payable	Other Current Liability
F. E. T.	Other Current Liability

RECEIVABLES

If you close a Work Order without applying a payment it becomes a RECIEVABLE. You can view your receivable listing by clicking on the RECEIVABLE button on the main tool bar or from the Main Control Menu choose Menus, Supervisor Menu then Receivables, then choose Payments and Charges. Items are listed by customer name and assigned a Receivable #. From here you can print a customer's statement, delete a receivable, or apply a payment to a customer's statement.

> NOTE: Print Statements will print an account statement for ALL receivable accounts listed. Individual Statements can be printed from the Receivable Detail Screen.

To apply a payment to an account, select the desired account from the list and then Account Activity. This will display a list of transactions that have occurred on the account. To make a payment, choose Enter Transaction. Enter the payment information and then Save.

PRINTING ERRORS

Printing errors may occur if the Printer set up has not set up correctly. Make sure that you double check that you followed the printer installation exactly before continuing to troubleshoot. When setting up Shopcontroller, go to your windows printer setup and delete all printers that are not being used.

General Troubleshooting

- Tax Rate and/or Labor Rate are incorrect on Work Orders

Make sure you have set up your labor rates in the setup menu. To change your Labor Rate, from the Main Control Menu. Go to Menus ~ Set-up Menu, and select Computational. Remember, Fleet customers have their own rates. You will need to change the rates for the Fleet customers individually.

From the main toolbar choose Customers ~ Fleet Customer. Then select your customer and change their rates. You must open all active work orders from the Work Order button on the Toolbar, then open all labor/parts on those work orders and save them to make sure the labor/tax rates are accurate.

The Work Orders must be closed out before the commission reports will accurate. If you change your Technicians labor rate (pay rate), you must open all active work orders for that technician, then open and save all labor on each active work order. Make sure you have chosen your date range too. You may close out the commissions for a technician before you close the invoice. In the menu go to payment center and click on close commissions for the technician that is the selected person for that invoice.

Problem- Marketing System is not registering “Scheduled Services”

You must have created some labor tables and selected the “Scheduled Service” from the Scheduled Service Box. When a scheduled service labor table is applied to a work order and the Work Order is closed out, Shop Controller will track that labor table from the work order. When in the Marketing System, remember to choose your “format type” at the left middle of the marketing screen. Select Mailing Labels, Report Format or Postcards. Then on the right of the screen select your date range.

Example: You had a customer in for an oil change 3 months ago; you will choose a low date of 3 months earlier and a high date of 2 months from today. This will show any body in for the last 3 months and any one due in the next 2 months.

REPORTS

Cash Register Activity Report

Sales Activity Report

Sales Profit Report

Sales by Zip Code

Sales by Referred

Daily Income

Inventory Reorder Report

Physical Inventory Report

Receivable Aging Report

Quarterly Sales (Second Quarter)

Quarterly Sales (Third Quarter)

ADDITIONAL USER TIPS

1. Clicking on the magnifying glass in the Customer Information section displays Customer Search window to search for the Customer file.

2. Clicking on the magnifying glass in the Vehicle Information section, displays License Plate Search

3. Double clicking on the Vin # Blank box in the Vehicle Information section, displays the Vehicle Vin # Search Listing, to search for the Vehicle file.

4. Clicking on Pen / Pad Icon, in the Customer Information section, displays a Customer Note Pad for Customer notes.
(i.e. Bad checks- Cash only, Good customer, etc.)

5. Clicking on Pen / Pad Icon, in the Vehicle Information section, displays a Vehicle Note Pad for Vehicle notes.

6. Clicking on Job Status Down Arrow, in the Maintenance Information section, displays the Progress of the Work Order.

#7. Clicking on File Drawer Icon, in the Maintenance section, displays Service History for the Vehicle listed on Work Order.

8.Clicking on Pencil Icon, in the Maintenance section, displays the Discount screen. Clicking on either the Labor or Parts Discount Down Arrow, will display the Percentage Discount.

9. Clicking on Eye Icon, in the Maintenance section, displays the Profit and Cost Look window.

10.Clicking on Calculator Icon, in the Maintenance section, displays the Calculator (Standard or Scientific).

11. Clicking on Clock Icon, in the Maintenance section, displays the Scheduler Calendar.

#12. You can search for customer information by double clicking on plate number, vin number, make or vehicle entry fields.
This will automatically bring up vehicle information for the Invoice. In the vehicle listing you may sort the different headings by clicking
On any heading which will automatically sort as to numerical or alphabetical by heading.

This user guide is a basic guide, please use the help menu in ShopController or call us at **800.898.2038** 7:00 to 3:30 MST

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