

A close-up, grayscale image of a car engine, showing various hoses, belts, and mechanical components.

# ALLDATA **MANAGE**® Online SETUP GUIDE



# OVERVIEW

This set up guide is designed to help new users set up and customize ALLDATA Manage Online for their shop's specific needs and workflow.

## WALK THRU

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 right corner

## SUPPORT SITE

[ALLDATAsupport.com](https://alldata.com/support) contains detailed articles on how to set up and customize Manage Online as well as use features and functions. These articles are a great accompaniment to this set up guide. You can print any article, view FAQs, etc.



Look for this icon throughout this set up guide for links specific how-to articles

## VIDEO TUTORIALS

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



Look for this icon throughout this set up guide for links to specific YouTube tutorials

## INFOGRAPHIC



Look for this icon throughout this set up guide for links to specific visual aids/infographics.

## ON DEMAND WEBINARS

Pre-recorded webinars available 24/7 demonstrating in-depth coverage of the most in-demand training topics for ALLDATA Manage Online. Register for a webinar [here](#)

# TABLE OF CONTENTS

<b>PRIMARY SETUP</b> .....	5	<b>Access Control</b> .....	32
<b>EXERCISE 1 PRIMARY</b> .....	6	<b>Tire Settings</b> .....	33
<b>Adding Company Information</b> .....	9	<b>Labor Time Adjustment</b> .....	34
<b>Setting Up Taxes</b> .....	9	<b>WIP (WORK IN PROGRESS)</b>	
<b>Labor Set Up</b> .....	10	<b>EXERCISE 3 WIP</b> .....	36
<b>Pricing</b> .....	11	<b>WIP Setup</b> .....	37
<b>Shop Supplies and Hazard Disposal</b> .....	12	<b>ADVANCED SETUP ACCOUNTING</b>	
<b>Emailing &amp; Printing</b> .....	13	<b>EXERCISE 4 ACCOUNTING</b> .....	42
<b>Technicians &amp; Service Writers</b> .....	15	<b>Sales Class Codes</b> .....	43
<b>Document Footer &amp; Invoice History</b> .....	16	<b>Opening Balances</b> .....	44
<b>Vendor &amp; Catalog Set Up</b> .....	17	<b>Account Types &amp; Product Group Codes</b> ....	45
<b>Enabling myCARFAX</b> .....	18	<b>Payment Terms &amp; Payment Methods</b> .....	46
<b>ADVANCED SETUP WORKFLOW</b>		<b>ADVANCED SETUP INVENTORY</b>	
<b>EXERCISE 2 WORKFLOW</b> .....	20	<b>EXERCISE 5 INVENTORY</b> .....	48
<b>Symptoms &amp; Suggested Jobs</b> .....	22	<b>Adding Parts to Inventory</b> .....	49
<b>Custom Jobs</b> .....	23	<b>Stock Adjustment &amp; Return Reasons</b> .....	50
<b>Work Descriptions &amp; Advisory Notes</b> .....	24	<b>Enabling Core Tracking</b> .....	51
<b>Messages &amp; Reminder Types</b> .....	25	<b>Line Codes &amp; Range codes</b> .....	52
<b>Media and Deferred Reason Codes</b> .....	26	<b>THIRD PARTY INTEGRATIONS</b>	
<b>Status</b> .....	27	<b>EXERCISE 6 THIRD PARTY</b> .....	54
<b>Work Types &amp; Key Tags</b> .....	28	<b>Setting Up QuickBooks Online</b> .....	55
<b>Schedule</b> .....	29	<b>Setting Up QuickBooks Export</b> .....	56
<b>Inspection Schedule</b> .....	30	<b>PaySafePayment Processing</b> .....	57
<b>General Advanced</b> .....	31	<b>Integrating with Intuit DemandForce</b> .....	58

# GETTING STARTED

## FIND OUT

1. How to log in to Manage Online
2. Where to get support and help in the product
3. How to complete Primary setup

## QUICK TIP

Stay within the Manage Online pop-up window

You can log in to Manage Online from:

- [ManageOnline.ALLDATA.com](https://ManageOnline.ALLDATA.com)
- [ALLDATA.com/login-center](https://ALLDATA.com/login-center)

# GETTING STARTED

## SETUP AND CUSTOMIZATION

### Logging In

1. Locate the Username and Password in your welcome email. If you did not receive an email, call an Account Executive at 800-859-3282, option 4 to retrieve your password.
2. Go to [manageonline.alldata.com](http://manageonline.alldata.com) (no 'www')
3. Click **GO TO LOGIN PAGE**
4. Enter Username and Password
5. Enter a new password that includes the following:
  - 8 characters
  - 1 upper case letter
  - 1 number
  - 1 special character (example: !, \$, %)
  - Click **Change Password**

Note: Passwords must be changed every 90 days.

### 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 **Workflow Setup:** to further customize Manage Online!

If you'd like to set up any third-party integrations, begin **Third-Party Setup:**

#### Things to have handy as you complete setup:

- 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

<b>Step 3</b>	<b>Username</b>	<b>Password</b>
Log in with your user information.	USERNAME-1	A5830E
	USERNAME-2	3EC491
	USERNAME-3	F9074E

# EXERCISE 1.0

## Primary Setup:



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

## Exercise:

Gather and record this shop information prior to setup. This information is needed for both setup and your initial training

**Company Information:** Confirm company information and add any shop license numbers for your business

License 1

License 2

License 3

**Labor Rates:** How many different labor rates does your shop charge? What are they?

**Tax Rates:** Confirm tax rates for parts, labor, other items

**Pricing:** Select a default parts markup percentage.

Set minimum Check Margins alert

Parts

Labor

Total Margin

**Shop Supplies:** Will you charge for Shop Supplies? Does your state allow it?

Percentage  
(total, parts, labor)

or

Fixed charge

**Hazard Disposal:** How much do you charge for HAZMAT? Do you have an EPA number for HAZMAT?

Descriptions

EPA #

Sell Prices

**Technicians:** First and last names of all technicians  
Any certification numbers? Hourly pay rate?

Name

Certification #

Hourly Cost

**Service Writers:** First and last names of service writers/advisors/managers

# EXERCISE 1.1

**Emailing:** When emailing customers what specific email message or wording do you want to accompany an Estimate, RO, Invoice, etc.?

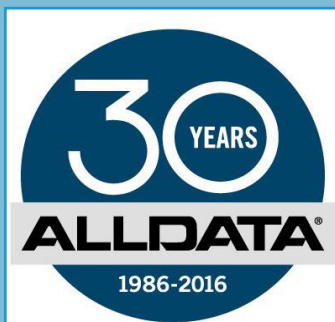
Example: Thank you for choosing ALLDATA's Auto. Please find attached a copy of your Invoice. We appreciate your business and trust you will be happy with our work and return if you are ever in need of further services.

Estimate

Repair Order

Invoice

**Printing:** Do you have a logo you want on your customer's Estimate, RO, Invoice?  
Select your logo from your computer  
For the best results images should be 230 pixels wide and 160 pixels high. Approximately 3" x 2"



**General:** Does your state require customer R/O authorization? Y or N?

What number sequence (9 character limit) would you like to begin for each customer document? (Estimate, RO, Invoice etc.)

You may want to continue using the same numbering sequence you are currently using

Invoice

Credit

Estimate

R/O

Purchase Order

Do you want to enable [Suggested Jobs? \(p22\)](#) Y or N?

**myCARFAX:** Would you like to enable myCARFAX for QuickVIN decoding & Service history for most vehicles?

Y or N

Would you like to sign up your customers for the myCARFAX mobile application? Become their preferred repair location.

Y or N

# EXERCISE 1.2

**Vendors/Catalogs:** Who are your preferred parts vendors for both electronic parts ordering and manual parts ordering ?



Ensure you have usernames, passwords, Store ID's if necessary etc.

Example: Vendor: O'Reilly  
Catalog: IAP  
User Name: stores  
Password: password  
Store ID: 182756  
Program Group: alliance  
Partner Company: oreilly

Vendor 1

Catalog 1

Credentials

Vendor 2

Catalog 2

Credentials

Vendor 3

Catalog 3

Credentials

**Messages-General:** What general text and email messages do you / would you send to customers?

Example: Vehicle Ready For Pickup, Welcome, Thanks For Your Business etc.

Dear [FIRSTNAME],

Thank you for choosing our shop for your vehicle service and repair needs.  
If you require any further assistance please contact us at 555-555-5555 or visit our website at www.com

**Messages-Reminders:** What reminder messages do you / would you send to customers?

Example: Oil Change Service, Deferred Work, Emissions Inspection, Recommended Service etc.

Service: Dear [TITLE] [LASTNAME], the Service on your [MAKE] [MODEL] registration [LIC] is due on [DUE]. Please call 555-555-5555 to arrange an appointment.

Deferred text: [FIRSTNAME] The following work [DEFERRED WORK] was previously declined and is now due on your [MODEL]  
Call 555-555-5555 for an appointment.

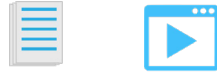
Deferred Email: Dear [TITLE] [LASTNAME]  
Re: [DEFERRED WORK]  
The previously declined work for your [MAKE] [MODEL] is now due. Please contact us for further details or to arrange an appointment.  
Thank You. ALLDATA Auto



# PRIMARY SETUP-TAXES

Primary setup should be completed before using ALLDATA Manage Online. In-product Guidance will help you complete all of these items

## Adding Company Info



Click **Setup** >> **User Options** >> **Company Info**.

Fill in/verify the Company Info fields >> click **Update**.

Note: This information will appear on your printed Estimates, Repair Orders and Invoices.

**IMPORTANT:** The **Name** field cannot be edited. To update this information, contact your account manager at 1-800-859-3282, option 4.

Depending on your state, Licence information must be included in Company Info.

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

Company Info

Licence 1  
Licence 2  
Licence 3

Registered Address

Name: Johns Automotive  
Work Telephone: (916) 684-5200  
Fax:  
Email: autoshop@alldata.com  
Website:  
Address: 9650 W TARON DR  
City: Elk Grove  
State: CA CALIFORNIA  
Zip Code: 95757 8197

Update Cancel

## Setting Up Taxes

Click **Setup** >> **Codes** >> **Tax Setup**.

Click **Update Tax** to update current tax rates for your location based on the ZIP code.

Select a default **Product Tax Type** for **non inventory parts** and **Non inventory tires** >> click **Update Defaults**.

**Note:** To apply taxes before the discount is applied, click the **Apply Tax** before discount check box. Consult your tax professional to confirm you are able to use this feature in your state.

Add additional tax codes (optional): Enter a **Type, Description**, select **Resale** or **Exempt**, enter a **Commodity Code, State, City, District** >> click **Update**.

**Note:** Consult your tax professional to confirm the tax codes in your State, County, City and District.

Apply Tax before discount

Select the default Product Tax Type to use for:

Non inventory parts: Parts  
Non inventory tires: Parts

Update Defaults

Update Tax

Last Checked : 7/12/2017 9:30:38 AM

Click the Update Tax button below to update your system with the current tax rate for your location. This will be based on your Zip code 95757-8197, as set in the Company Info screen. **Please note that tax information and calculations are provided only as a guide and it is your responsibility to ensure you are collecting the correct amount of tax on your sales.**

# PRIMARY SETUP-LABOR RATES

Manage Online allows you to create multiple Labor Codes and then quickly pull them up when creating invoices for customers. e.g Diagnostics, Shop Labor, State Inspection etc. Labor codes can be edited at anytime.

## Labor Setup



To create a new labor rate:

Select Setup >> **Labor**.

Fill in the Labor Maintenance information for the following categories >> click **Update**.

**Labor Code:** 1-4 digit code that identifies the labor code in the program.

**Description:** A description of the labor code.

**Sales Class Code:** The numeric code used to identify the labor code for tax purposes.

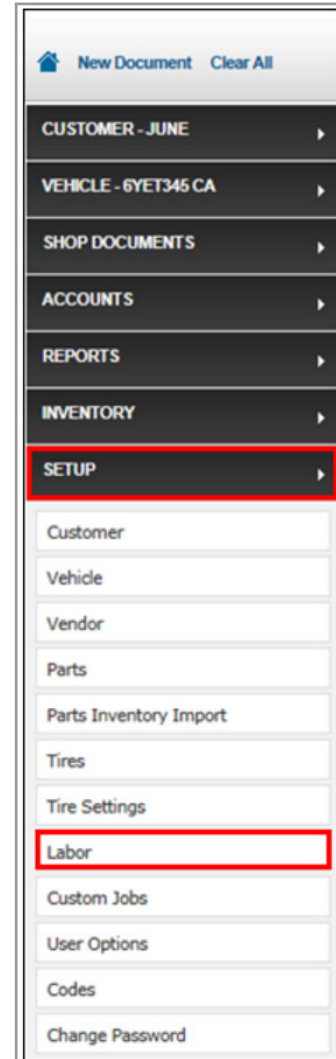
**Product Tax Type:** The tax type used for tax purposes.

**Cost:** Your cost of the labor.

**Selling:** The price at which you are selling the labor.

**Inspection:** Identifies the labor code as an Inspection.

**Note:** It is recommended to create a separate labor code for Inspection and check the Inspection Labor box if you want to include the item in an Inspection Labor Report from the Reports menu or if you plan to use the Inspection Schedule.



Labor Maintenance							
Labor Code	Description	Sales Class Code	Product Tax Type	Cost	Selling	Inspection	
			1 - Parts			<input type="checkbox"/>	
Labor Code	Description	Sales Class	PTT	Cost	Selling	Inspection	Edit
BATT	Battery Replacement	4001	2	5.00	15.00	<input type="checkbox"/>	
BRPF	Brake Pads- Front	4001	2	20.00	98.00	<input checked="" type="checkbox"/>	
INSP1	Inspection	4001	2	25.00	105.00	<input checked="" type="checkbox"/>	
LAB1	Shop Labor	4001	2	20.00	85.00	<input type="checkbox"/>	
LAB2	Diagnostic, Mechanical	4001	2	20.00	75.00	<input type="checkbox"/>	
LAB3	Diagnostic, Electrical	4001	2	20.00	85.00	<input type="checkbox"/>	
LAB4	Diagnostic, DTC/Systems Codes		1	30.00	105.00	<input checked="" type="checkbox"/>	
OIL1	Conventional Oil Change	4001	2	7.00	15.00	<input checked="" type="checkbox"/>	
OIL2	Synthetic Oil Change	4001	2	7.00	15.00	<input checked="" type="checkbox"/>	

# PRIMARY SETUP-PRICING

Pricing options allow you to enable markups and set markup pricing.

## Pricing



### Enable Markup Pricing

Select **Setup >> User Options >> Pricing**.

Check **Enable Markup Pricing**.

Note: This will apply markups to 3rd party online catalog pricing only.

Check to include additional parts categories to apply markups to:

**Apply Markups to My Prices as well**

**Apply Markups to Quick Parts / Fluids**

Click **Update**.

### Setting Default Markup

To set your default markup:

Select **Setup >> User Options >> Pricing**.

Enable Markup Pricing (See above)

Type in your default markup percentage >> select **Update**.

Note: This will apply markups to any price ranges that have not been added to the Markup Matrix price ranges.

Click **Update**.

### Setting Markups by Price Range

To set your markups by price range:

Select **Setup >> User Options >> Pricing**.

Set up **Markup Pricing**

(see Enable Markup Pricing )

Using the **Markup Matrix**, select a **Vendor**, type in a **From Value, To Value**, choose \$ or %, and a **Markup** percentage.

Select **Add**.

Continue to add price ranges and vendors as needed.

Click **Update**.

### Setting Minimum Alerts (Check Margins Alerts)

To set alerts to display when total margins fall below a minimum:

Select **Setup >> User Options >> Pricing**.

Type a percentage for **Parts Margin, Labor Margin,** and **Total Margin**.

Click **Update**.

### Enforcing Minimum Password Check

To require a password to continue with an invoice when the total margin falls below the set minimum margin:

Select **Setup >> User Options >> Pricing**.

Click the check box >> enter a Password.

Click **Update**.

# PRIMARY SETUP-HAZMAT

Applying HAZMAT and Shop Supplies fees to repair orders can help you recover costs that are not usually billed on an invoice, such as the cost of rubber gloves, brake cleaner, shop rags, used oil and used antifreeze disposal, etc.

## Shop Supplies



Review your local or state laws to confirm you are able to apply a Shop Supplies fee on your invoices.

Click **Setup >> User Options >> Shop Supplies**.

Click the Apply Shop Supplies Fee check box and select a Type.

**Type:** Select how the Shop Supplies Fee will be calculated.

**% of Total:** Fee is calculated from a percentage of the total dollar amount of the repair order.

**% of Parts:** Fee is calculated from a percentage of the total dollar amount of parts on the repair order.

**% of Labor:** Fee is calculated from a percentage of the total dollar amount of labor on the repair order.

**Fixed Price:** Fee is a fixed price that is applied to every repair order.

Enter a percent or fixed price amount.

Note:  
The Percent is the percent of the Type selected above that will determine the Shop Supplies fee.

Select a **Sales Class Code** and a **Product Tax Type** >> click **Update**.

## Hazard Disposal



Work Types can be set up with a color and description so that at a glance a user can easily see the type of work that is required for an estimate or repair order.

Click **Setup >> Codes >> Hazard Disposal**.

Enter a **Code, EPA Number, Cost, Sell**, select a **PTT** >> click **Update**.

**Code:** One to ten digits that identify a code within the program. (Example: USED ANTI)

**EPA Number:** The EPA number associated with the hazardous material. (Example: 456784)

**Cost:** Cost of disposal to the shop.

**Sell:** Cost of disposal to the customer.

**PTT:** Category of hazardous material.

Code	Description	Check Stock	Sell	Qty	Disc %	Tax %	Total +Tax	Actions
+ Add Job Group Authorized on 5/16/2018 10:01 Mileage IN 67432 Confirm OUT 67432 Confirm								
+ Item ↑ ↓ Parts 321.59 *** X								
LAB1	Shop Labor		45.00	1.13	0.00	0.0	50.85	*** X
AAA	Water Pump Rebul... <a href="#">more</a>	✓	205.83	1.12	0.00	8.0	248.97	*** X
AAA	CORE - Water Pump	🚗	18.00	1.12	0.00	8.0	21.77	*** X
+ Item ↑ ↓ Part 19.44 *** X								
CNV00056	ROTOR IGNITION	⚠️	18.00	1	0.00	8.0	19.44	*** X
	Shop Supplies		6.49	-	0.00	8.0	7.01	
	Hazmat		1	-	-	-	5.40	
Planned Hours 0.00							Sub Total	331.03
							Tax	22.41
							<b>Total</b>	<b>353.44</b>

# PRIMARY SETUP-EMAIL

## Emailing



Setting up Emailing will allow you to customize specific emails your shop can send to a customer. Define email messages for Quotes, Repair Orders, Invoices, etc.

To change Emailing settings click Setup >> **User Options >> Emailing.**

Complete or update each message.

Confirm the **Sender Email** address and click **Update.**

The screenshot displays the 'User Options & Settings' window. On the left sidebar, the 'SETUP' menu is expanded, and 'User Options' is selected. The 'Emailing' option is highlighted in the left-hand menu. The main content area shows 'Email Settings' with various email templates and their content. A red box highlights the 'Sender Email' field, which is currently empty. Below it, the 'BCC All Emails' checkbox is also highlighted. At the bottom of the window, the 'Update' button is visible.

# PRIMARY SETUP-PRINTING

## Printing



Printing options allow you to customize print layouts, add an estimate disclaimer, upload document logos, change margins, enable pop-up print previews, and consolidate lines.

To set or update your printing settings select **Setup >> User Options >> Printing.**

**Document Logo Upload:** Adds your shop logo to the customer documents. For best results, image should be 230 pixels wide by 160 pixels high

**Margins:** Controls the header and footer margins on the printed pages.

**Automatically popup print preview:** Print preview opens when you create the documents listed.

**Consolidate lines on document:** You can choose to minimize lines on a document and hide part numbers.

**Invoice Reprint:** When reprinting an invoice for a customer whose address had been changed, receive a prompt to select the Current or Original address.

**Include Schedule of Work:** Print a copy of the invoice with no monetary values for parts and labor. Helpful when splitting invoice payment with 3rd party. Add any text you want to appear on the Schedule of Work Example: This document is for reference purposes only. This is not an Invoice

## Print Output Options:

Choose to display the following sections by checking the corresponding boxes:

### Your Right to a Written Estimate

<b>Your Right to a Written Estimate</b> (Please Sign)	<b>PLEASE READ CAREFULLY, CHECK ONE OF THE STATEMENTS BELOW, AND SIGN:</b>
	I UNDERSTAND THAT, UNDER STATE LAW, I AM ENTITLED TO A WRITTEN ESTIMATE IF MY FINAL BILL WILL EXCEED \$100.
	<input type="checkbox"/> I REQUEST A WRITTEN ESTIMATE.
<input type="checkbox"/> I DO NOT REQUEST A WRITTEN ESTIMATE AS LONG AS THE REPAIR COSTS DO NOT EXCEED \$ _____. THE SHOP MAY NOT EXCEED THIS AMOUNT WITHOUT MY WRITTEN OR ORAL APPROVAL	

### Discounts

Labor	Tech	Hrs	Price	Discount	Total
Default Labor		1.00	0.00	0.00%	0.00
Fixed Price Custom Job		1.00	100.00	0.00%	100.00

Parts	Part No	Qty	Price	Discount	Total
Test Part	AAA4444	1.00	0.00	0.00%	0.00
<b>Fixed Price Custom Job SubTotal</b>					<b>\$100.00</b>

### Labor Quantity & Rate

Labor	Tech	Hrs	Price	Discount	Total
Default Labor		1.00	100.00	0.00%	100.00
<b>Labor SubTotal</b>					<b>\$100.00</b>

### Save Replacement Parts

<b>Save replacement parts for inspection or return? (Core may apply)</b>
--

### Intended Method of Payment

<b>Intended Method of Payment:</b> <input type="checkbox"/> Check <input type="checkbox"/> Credit card <input type="checkbox"/>
---

### Proposed Completion Date

<b>Proposed Completed Date</b> 02-02-2018 5:00 PM	Labor Parts Hazmat* Supplies* Taxes
<b>Estimate Total</b>	

### Barcode

	Inspection: 34435454
---	----------------------

# PRIMARY SETUP-TECHNICIANS

The technician set up screen allows you to enable Technician Cost and Tracking so the service writer and/or technicians can enter their hourly paid rates. This can be used later in reports when calculating technician efficiency and cost.

## Adding Technicians

Set up Technicians by adding their names and certification numbers.

Click **Setup >> Codes >> Technicians.**

Enter a **Code** (up to three letters or numbers) >> **Name** >> **Certification Number** (optional) >> click **Update.**

Click the Inspector check box to mark the technician as an Inspector. This will allow that technician to be assigned to the Inspection Schedule.

## Enabling Technician Cost

**IMPORTANT - When using this feature, the Technicians' Hourly Rates will be visible on multiple screens to anyone using Manage Online.**

Click the **Enable Technician Cost** check box >> click Update.

Click the pencil icon to edit technician information.

Enter the **Hourly Cost** (hourly paid rate) >> click **Update.**

## Enabling Time Tracking

Enabling Time Tracking allows the Technicians' hours to be tracked.

Click the **Enable Time Tracking** check box >> click **Update.**

Optional: Check **Enforce Time Tracking Password Check** >> enter a password >> click **Update.**

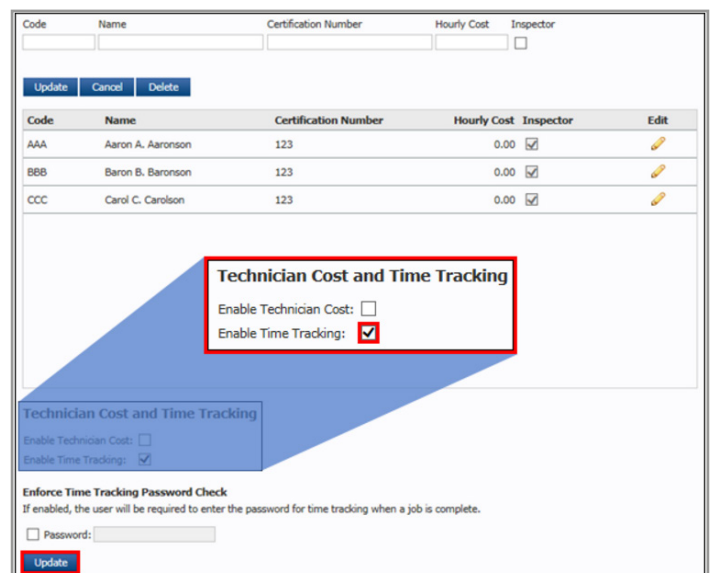
Note: This will trigger the need for the password when the Technician time is edited on a Repair Order that is accessed from the Technician Tracking Report.

## Service Writers




Add and edit service writer names

Click **Setup >> Codes >> Service Writers.**

Enter a **Code** (up to three letters or numbers) >> **Name** >> click **Update.**



The screenshot shows the Technician Setup interface. At the top, there are input fields for Code, Name, Certification Number, Hourly Cost, and an Inspector checkbox. Below these are buttons for Update, Cancel, and Delete. A table lists three technicians: AAA (Aaron A. Aaronson), BBB (Baron B. Baronson), and CCC (Carol C. Carlson), each with a Certification Number of 123 and an Hourly Cost of 0.00. The Inspector checkbox is checked for all. Below the table is a form titled "Technician Cost and Time Tracking" with two checkboxes: "Enable Technician Cost" (unchecked) and "Enable Time Tracking" (checked). At the bottom, there is a section for "Enforce Time Tracking Password Check" with a "Password:" input field and an "Update" button.

Code	Name	Certification Number	Hourly Cost	Inspector	Edit
AAA	Aaron A. Aaronson	123	0.00	<input checked="" type="checkbox"/>	
BBB	Baron B. Baronson	123	0.00	<input checked="" type="checkbox"/>	
CCC	Carol C. Carlson	123	0.00	<input checked="" type="checkbox"/>	

# PRIMARY SETUP-FOOTERS

## Document Footer



You can customize the footers of **Estimate, Repair Orders, Invoices, Invoice Notifications and Invoice Terms** to suit the terms of your shop's business practices.

To change document footers select **Setup >> User Options >> Document Footer** and complete or update each message.

Confirm and click **Update**.

For Florida customers please use this dedicated support page and video tutorial to help ensure you meet Florida state requirements



Document Footer Text

<b>Estimate</b> All Quotes / Estimates valid for 30 days	<b>Credit</b>
<b>R/O</b>	<b>Purchase Order</b> Please advise of any shortages
<b>Invoice</b>	<b>Customer Statement</b>
<b>Invoice Notification</b>	<b>Estimate Notification</b>
<b>Invoice Terms</b>	

**Font Size**

	<b>Footer</b>	<b>Notification</b>
<b>Invoice</b>	<input type="text"/>	<input type="text"/>
<b>Estimate</b>	<input type="text"/>	<input type="text"/>

## Invoice History Export

To export all invoice lines within a specific date range to a CSV file select **Setup >> User Options >> Invoice History Export** >> check the appropriate boxes >> click **Export**.

Invoice History Export

Use this export to create a line level flat file of all your invoices for a date range

Date From

Date To

Include Customer Details

Include Vehicle Details

Include Work Descriptions

**Export**



# PRIMARY SETUP-VENDORS

## VENDOR AND CATALOG SET UP

You can order parts online through ALLDATA Manage Online using any of the following: AutoZone and local parts vendors affiliated with the following parts catalogs: IMC, TurboParts (DST), WHI Solutions, Autocat+, Federated Autoi, Transtar Industries, American Tire Distributors (ATD).

### Setting Up Vendor Accounts



**Before you can order parts online, you must set up accounts with each VENDOR (parts supplier) AutoZone acts like a VENDOR and CATALOG. Contact your local AutoZone commercial store to set up an account and to get credentials. Contact each local VENDOR directly to set up an account and get credentials (such as a username and password).**

To set up a vendor, select Home >> Setup >> Vendor.

Fill in the following required Vendor information:

#### Vendor ID

If this is left blank, an ID will be created automatically.

#### Name

Highly Recommended: By completing these fields, the information will appear on future orders and will not have to be entered manually each time.

#### Address

After entering the Zip Code, click Lookup to automatically add the City and State.

#### Phone (Sales)

#### Contact (Sales)

#### Email (Sales)

#### Order Type

### Setting Up Catalogs



Click **Setup >> User Options >> Catalog/E-Business.**

Select **Vendor >>** select a **Catalog.**

Fill in the catalog credentials >> click **Update.**

The vendor and catalog are now linked. They can be updated by selecting **Edit** or **Delete.**

Note: Deleting a CATALOG will not delete the VENDOR.

Catalog / E-Business

AutoZone Settings

PIN

Password

Select Vendor IMC ▼

Catalog IMC ▼

Catalog IMC

Username

Password

StoreID

Account No

Update Delete

# PRIMARY SETUP-MYCARFAX

Use myCARFAX to:

- Decode the VIN (Vehicle Identification Number) from the license plate.
- View reported Service History by vehicle.
- Report completed services to CARFAX so that customers have a record of work performed.

## Enabling myCARFAX



Click **Setup >> User Options >> myCARFAX.**

Click the **Enable myCARFAX** and **Enable myCARFAX Customer Enrollment** check boxes >> verify and enter the required information fields >> click **Update.**

If your shop name contains special characters (ex: & ' - #), you will need to contact CARFAX support for assistance with integrating myCARFAX and Manage Online. <http://support.carfax.com/>

ALLDATA Manage Online is now connected to myCARFAX.

Notes:

- It may take up to 24 hours before you will be able to access myCARFAX
- Once connected to myCARFAX, up to the past two years of invoice data will be sent to myCARFAX.
- This does not include information that was converted from previous shop management systems.

myCARFAX

Every day, more than 34,000 dealers and aftermarket shops partner with myCARFAX to help their service business. Enroll your shop today at NO COST to get access to myCARFAX® shop tools including CARFAX QuickVIN™, Service History Check™, PLUS a free listing in the new myCARFAX® consumer app (iOS, Android, myCARFAX.com) and myCARFAX Point-of-Purchase material for your shop! These features are integrated directly into Manage Online to help you **increase service revenue and keep customers coming back!**  
Call 888.655.5362 or visit [www.mycarfaxserviceshop.com](http://www.mycarfaxserviceshop.com) for more information.

By ticking the box below "Enable myCARFAX" you agree to the [Terms and Conditions](#) of using myCARFAX.

Enable myCARFAX

The following details will be used to register your account.

Company ID: awalker \*

Company Name: Aaron's Garage \*

Address: 9650 W TARON DR, ELK G \*

City: Elk Grove \*

State: CALIFORNIA \*

Zip: \*

Phone: \*

Business Contact: ALLDATA \*

Technical Contact: Aaron Walker \*

Email: aaron.walker@alldata.com \*

Web Site: \*

\* Indicates required field

Status: Connected

First Connected : 12/15/2015 3:21:00 PM

QuickVIN and Service History access can take up to 24 hours before it is available.

**DATA TRANSFER**

Date Last Processed: 10/26/2016 1:48:03 AM

Date when last data was successfully sent: 9/8/2016 2:10:46 AM

myCARFAX Service History

HYUNDAI History Results

Make: HYUNDAI Model: GENESIS Year: 2011

Vin: KM9GC4DE3BU114990 Engine Information: 3.8L V6 SFI DOHC 24V Body Type Description: Sedan 4 DR

Expand All  Collapse All

Maintenance Item	Date Last Performed	Odometer
Emissions test	07/31/2015	57583

Date Issued	Details
3/16/2015	Manufacturer recall/service bulletin issued NHTSA #:14V713000 Recall #: 125 STOP LAMP CIRCUIT DIODE Status: Remedy Available

Date: 11/8/2013 Odometer: 34,612 Type: service

Service History Comments

#1 Passed emissions inspection

# ADVANCED SETUP- WORKFLOW

## FIND OUT

- Create lists of symptoms, work descriptions, etc.
- Create media and deferred work reason codes
- Define status and work types for better workflow

## QUICK TIP

- Pre-build a number of common symptoms, work descriptions and advisory notes for quick estimate or repair order creation.
- Create media codes & capture how your customers are hearing about you. Report on your most & least effective marketing effort.

# EXERCISE 2.0

## Advanced Setup: Workflow

What areas can you customize for a more efficient document writing workflow?

### Exercise:

Confirm defaults or customize this shop information in advanced setup. These areas will help speed up the ticket writing process and customize documents etc.

**Symptoms:** Manage Online comes with a list of Global Symptoms. But you can create your own.

Example:

Summary

Description

A/C Operation

Customer reports intermittent operation of A/C system during vehicle operation.  
Please check and advise.

**Work Descriptions:** Create your own work descriptions to add to common jobs. Work Descriptions will also be automatically added to a work document from a custom job.

Example:

Summary

Description

Rear Brakes

Replace Rear brake pads, check drums, add fluid as necessary

**Advisory Notes:** Create your own customer advisory notes to add to estimates and/or repair orders. May also use advisory notes to add disclaimers for specific work type.

Example:

Summary

Description

Brakes

Rear Brakes are worn to approx 25% and will require replacement soon.

**Media Codes:** What are the methods you'd like to track regarding how your customers hear about you?

Example:

Text/Email promo  
Customer Referral  
Website Visit  
Walk In

**Deferred Reason Codes:** What additional reasons do you want to track for customers declining work?

Example:

IF - Insufficient Funds  
NC - Not Critical  
NRG - No Reason Given  
O - Other  
SI - Scheduling Issue

**myCARFAX:** Would you like to sign up your customers for the myCARFAX application? Enable QuickVIN decoding? View service history for most vehicles?

Enable myCARFAX? Y or N

Enable Customer Enrollment? Y or N

# EXERCISE 2.1

## Advanced Setup: Workflow

What areas can you customize for a more efficient document writing workflow?

### Exercise:

Confirm defaults or customize this shop information prior to advanced setup. These areas will help speed up the ticket writing process and customize documents etc.

**Key Tags:** Sometimes referred to as "hats", would you use a key tag numbering systems to track keys to current vehicles?

Example:

001  
002  
003

**Schedule:** What are the total daily hours available for your shop? (number of techs X number of hours they work in a week)

Color the RO by Status or Work Type?

Divide schedule by Bay Number or Technician Name?

Vehicle due in/due out times?

Are you using Work In Progress? Confirm or edit default settings.

**Document Footer:** What shop specific information would you like to include at the bottom of customer outputs (Estimate, RO, Invoice Credit etc.)

Example estimate footer. "All Quotes/Estimates valid for 30 days. 1yr/12,000 mile limited warranty on all work"

**Reminder Types:** What reminder types do you want to track for each customer?

What common recurring services would you like to follow up on with your customers?

Example: Service

Timing Belt

Oil Change

Emissions Inspection

**Access Control:** What page/area of the shop management system would you like to password protect? Click to select each page.

Inventory

User Options

Accounts

Credit Notes

Reports

WIP Settings

Setup

# ADVANCED SETUP- WORKFLOW

Suggested Jobs allow you to connect Custom Jobs to pre-defined symptoms. When an associated symptom has been added to an estimate, a list of Suggested Jobs will be displayed. Manage Online comes pre-configured with Global Symptoms and Global Custom Jobs.

## Symptoms



**Symptoms: Common customer complaints and/or technician observations**

Click **Setup >> Code >> Symptoms**.  
Enter a **Code**, **Summary** and **Description** >> click **Update**.

**Code:** One to four digits that identify the symptom

**Summary:** The subject of the symptom

**Description:** A description of the symptom

Code	Summary	Description	Suggested Jobs	Edit
Batt	Battery Check	Battery will not hold a charge. Please Check and Advise.	+	
CHK1	Check Engine Light	Check Engine Light is On. Please Check and Advise.	+	
CHK2	ABS Light	ABS Light is On. Please Check and Advise.	+	
CHK3	SRS Light	SRS Light is On. Please Check and Advise.	+	
LEK1	Fluid Leak - Front	Fluid is leaking from the Front of the Vehicle. Please Check and Advise.	+	
LEK2	Fluid Leak - Rear	Fluid is leaking from the Rear of the Vehicle. Please Check and Advise.	+	
NSE1	Noise - Front	Noise is coming from the Front of the Vehicle. Please Check and Advise.	+	
ONLINE	Online Booking	Online Booking	+	

## Suggested Jobs

**Assigning Suggested Jobs**

Click the **+** icon for a Symptom.

Note: If Suggested Jobs have already been assigned, the **+** icon will display the number of Suggested Jobs that have been selected.

Select the Custom Jobs that will be suggested when the Symptom is added to an Estimate >> click **Okay**.

Categories	Job Name	Job Description	Type	Price
Uncategorized	XALT	Remove and Replace Alternator	Standard	0.00
Air Conditioning & Heater	XBATT	Remove and Replace Battery	Standard	0.00
Alignment	XCSP	Complete Spark Plug Job	Standard	0.00
Brakes	XDSTR	Remove and Replace Distributor	Standard	0.00
Cooling System	XGP	Remove and Replace Glow Plugs	Standard	0.00
Diagnosis & Inspection	XIC	Remove and Replace Ignition Coil(s)	Standard	0.00
Electrical & Battery 3	XNSS	Remove and Replace Neutral Safety Switch	Standard	0.00
Engine Performance	XSTRT	Remove and Replace Starter	Standard	0.00
Exterior Interior	XWLM	Remove and Replace Window Lift Motor	Standard	0.00
Fluids				
Specials & Promotions				
Tires				
Transmission, Differential, Transfer Case				
Under Hood				
Under Vehicle				
Steering & Suspension				

# ADVANCED SETUP- WORKFLOW

Custom Jobs are pre-built jobs that can be quickly added to a work document. Manage Online comes installed with over 100 categorized custom jobs. This section will illustrate how to create your own Standard priced custom job.

## Custom Jobs



While labor rates and catalogs are the only requirements for creating custom jobs we recommend first setting up the following:

1. Labor Rates
2. Parts Inventory
3. Work Descriptions
4. Vendors
5. Electronic Parts Catalogs

Click **Setup >> Custom Jobs**

Enter a **Job Name >> Description >>** select a **Sales Class Code.**

**Note:** The Description will appear on the customer's invoice.

**Price Types** include **Standard, Package, Complete** and **Fixed.**

Select **Standard.**

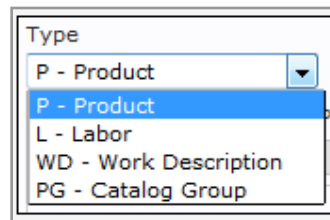
Complete the job specific options below:

**Category:** This job will appear under the assigned category when making selections from the Custom Job selection screen.

**Use Customer Rate:** Selecting Use Customer Rate will substitute the customer's Default Labor Rate for the existing labor rate in the Custom Job.

**Active:** Unchecking this box will remove the job from the Custom Jobs selection screen.

Select a **Type** to start adding items:



**P – Product:** In Description, enter the part name (or % to search all parts) then click **Search.**

If the part does not exist in your database, you can add a new part by:

Entering a **Line Code >> Code >> Description >> Qty.**

To change the prices of existing parts or to set prices for new parts:

Check the Override Prices checkbox >> enter the appropriate pricing information in the Sell, Trade Price and Cost Price boxes .

**L – Labor:** Click **Search** to select an existing labor rate, then enter the labor hours into the **Qty** box.

**WD – Work Description:** Click **Search** to select a pre-built **Work Description.**

**PG - Catalog Group:** Add **Catalog Groups** to save time when searching integrated electronic parts catalogs

**Note:** When a Custom Job with a **PG – Catalog Group** is added to the work document, the electronic catalog will automatically open, with links to the desired parts under “**Pick List.**” Available Catalogs to use: **OEM, AutoZone, Transtar, NexPart.**

# ADVANCED SETUP- WORKFLOW

Work Descriptions and Advisory Notes can all be set up to quickly add to a customer's estimate or repair order.  
The system also allows the ability to free-type Work Descriptions and Advisory Notes.

## Work Descriptions and Advisory Notes



**Work Descriptions: Common work performed on many vehicles e.g. Lube,Oil,Filter. Replace Front Brake Pads & Rotors etc.**

Click **Setup >> Code >> Work Descriptions**.  
Enter a **Code, Summary** and **Description** >> click **Update**.

**Advisory Notes: Common work recommendations and customer advice. e.g. Brake Pads and Rotors need replacing soon.**

Click **Setup >> Code >> Advisory Notes**.  
Enter a **Code, Summary** and **Description** >> click **Update**.

**Code:** One to four digits that identify the work descriptions or advisory note within the program.  
(Example: BATT)

**Summary:** The subject of the work description or advisory note  
(Example: Battery Check)

**Description:** A description of the work description of advisory note.

Predefined Advisory Notes	
<b>Brakes</b> Front / Rear Brakes are worn and will require attention soon	✓
<b>Check back after a week</b> Bring back the vehicle after a week for Inspection	✓
<b>Check Back after a week</b> Bring back the vehicle after a week for Inspection.	✓
<b>FREETTYPE</b> Free text	✓
<b>FREETTYPE</b>	✓
<b>Tire Pressure</b> Your tire pressure has been checked and is at manufacturer suggested psi. Properly inflated tires increase tire life, fuel...	✓
<b>TIRES WORN</b> NSF / NSR / OSF / OSR Tire is worn	✓
<b>WINTER</b> buy winter skid accessories	✓

Selected Advisory Notes	
Description	Type
Front / Rear Brakes are worn and will require attention soon	<a href="#">Document</a>



# ADVANCED SETUP- WORKFLOW

Reminders are used to alert you to customers' service and maintenance needs.

## Reminder Types



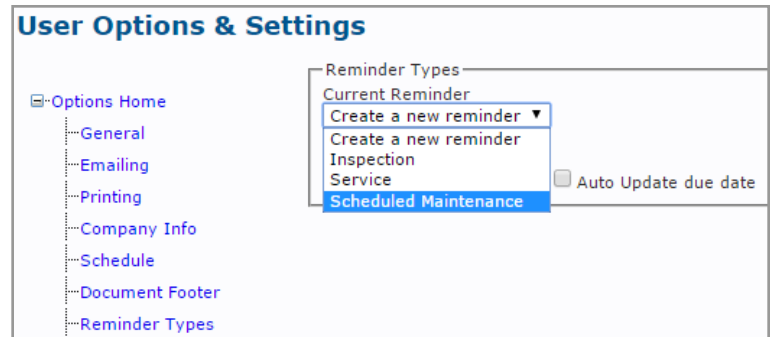
Click **Setup >> User Options >> Reminder Types**.

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.

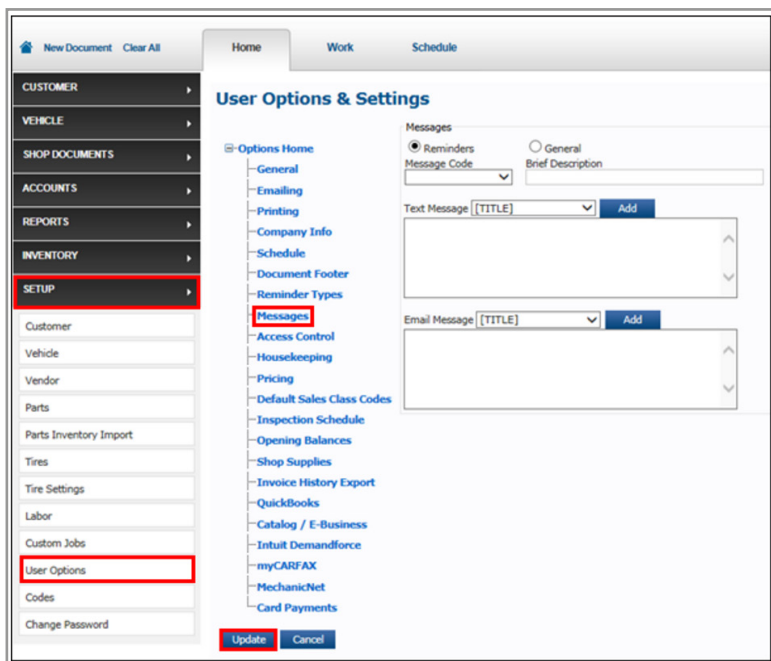


Reminder Types can be assigned to customers' vehicles on the Work screen.

## Messages



Customize text and Email reminders by selecting **User Options >> Messages** >> create your custom message >> **Update**.



# ADVANCED SETUP- WORKFLOW

## Media Codes



**Media Codes** allow users to identify marketing campaigns during invoicing. This is helpful to track customer marketing reach when running an email, radio, word-of-mouth, print, or social media campaign.

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

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

**Code:** One to four digits that identify a code within the program. (Example: NEW)

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

Code	Desc	Edit
NEW	Newspaper Advertisement	
RAD	Radio Advertisement	
REF	Referral	
TV	Television Advertisement	
WEB	Web Site Visit	
WOM	Word of Mouth	

## Deferred Job Reason Codes



**Deferred Job Reason Codes** allow users to set up different reasons for work deferred by the customer.

Click **Setup >> Codes >> Deferred Job Reason Codes**.

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

**Code:** One to four digits that identify a code within the program. (Example: IF)

**Desc:** A description of the deferred job reason code.

Code	Desc	Edit
IF	Insufficient Funds	
NC	Not Critical	
NI	Not Important to Customer	
NRG	No Reason Given	
O	Other	
SI	Scheduling Issue	

# ADVANCED SETUP- WORKFLOW

## Status



The Status codes can be set up with a color and description so that at a glance a user can easily track Repair Orders on the Work In Progress screen and color-code Repair Orders on the Scheduler.

### Create Status Codes:

Click **Setup >> Codes >> Status**.

Select or enter the following:

**Category:** Selecting whether the Status is for an Estimate or an R/O.

**Code:** One to four digits that identify a code within the program. (Example: 10)

**Status Description:** The current status in the workflow of the vehicle. (Example: Confirmed)

**WIP Category:** Choose which WIP Preset Status you want connected to this Customizable Status. (Example: Pre Arrival)

**Color:** Color that identifies the code to the user.

### Edit Status Codes:

Click the pencil icon for the Status code you want to edit.

Edit the Status code as desired >> click **Update**.

Category	Code	Status Description	WIP Category	Color	
R/O	20	Re Schedule	Pre Arrival	Yellow	
R/O	10	Confirmed	Pre Arrival	Yellow	
R/O	20	Re Schedule	Pre Arrival	Yellow	
R/O	30	Awaiting Inspection	Awaiting Start	Pink	
R/O	50	Awaiting Work Start	Awaiting Start	Magenta	
R/O	60	In Bay	In Progress	Light Purple	
R/O	70	Out for Test Drive	In Progress	Blue	
R/O	80	Quality Control	In Progress	Dark Blue	
R/O	90	Wait on Parts	On Hold	Light Red	
R/O	100	Wait on Tech	On Hold	Red	
R/O	110	Wait on Auth	On Hold	Red	
R/O	120	Work Complete	Work Complete	Green	

# ADVANCED SETUP- WORKFLOW

## Work Types



Work Types can be set up with a color and description so that at a glance a user can easily see the type of work that is required for an estimate or repair order.

Click **Setup >> Codes >> Work Types**.

Enter a **Code**, **Desc**, select a **Color** >> click **Update**.

**Code:** One to four digits that identify a code within the program. (Example: 1)

**Desc:** A description of the work type. (Example: General Repair)

**Color:** Color that identifies the code to the user.

The screenshot shows the 'Work Types' setup interface. At the top, there are three input fields: 'Code', 'Desc', and 'Color'. The 'Color' field is a dropdown menu with a color palette below it. Below the form are three buttons: 'Update', 'Cancel', and 'Delete'. Below the buttons is a table with the following data:

Code	Desc	Color	Edit
1	General Repair	Gold	
2	LOF	Dark Red	
3	Tires	Green	
4	Brakes	Red	
5	Diagnostic	Yellow	

## Key Tags



When checking a vehicle on-site, the Key Tag provides an option to select which key tag has been applied to the vehicle.

Click **Setup >> Codes >> Key Tag**.

Enter a Key Tag (up to four numbers) >> click **Update**.

The screenshot shows the 'Key Tag' setup interface. At the top, there is a single input field for 'Key Tag'. Below the field are three buttons: 'Update', 'Cancel', and 'Delete'. Below the buttons is a table with the following data:

Key Tag	Edit
0010	
0020	
0030	
0040	

# ADVANCED SETUP- WORKFLOW

The Schedule feature is used to schedule existing Repair Orders against available tech hours in your shop. You can label bays by number or the names of your techs.

## Schedule



To set up the schedule:

Select Setup >> User Options >> Schedule

In Schedule Settings set up the following:

### Total Daily Hours Available

Enter the available number of work hours for each day.

Example: The number of technicians multiplied by their available work hours per day.

### Color Code R/O

Select to include color coding for schedule entries based on R/O Status or Work Type.

Note: You must have Status Codes or Work Types Codes set up in order to use color coding.

### Specify Workshop Bay and Duration

Enable this option if you are using the Inspection Schedule.

### Enable Time Slots

Create a grid of hours on the schedule, broken into 15 minute increments.

Enter the Start Time and End Time for the shop's work day.

### Hide Completed R/O

If you do not choose to Enable time slots, use this option to "hide" R/Os on the schedule as they are completed.

### Schedule Bay Display

Select the amount of bays you want the schedule to display.

### Repair Order Information

Choose what items to include on each schedule entry by:

Selecting an item

Selecting a line.

Clicking Add.

Change how each line displays the included items by:

Selecting an item that has been added to a line.

Selecting the Up and Down arrows to change the display order.

Clicking the X to remove the item from the line.

### Due In / Out

Set the Default Due In Time and the Default Due Out Time for all new R/Os.

Click the Use Schedule Start Time If Available check box to automatically apply the date and time of the R/O on the schedule to the Work document.

### Work In Progress Options

Set the amount of minutes to be visually notified that an R/O is due in/out.

Remove completed Repair Orders from the Work In Progress (WIP) screen, after a set amount of days.

Notes:

- 7 days is automatically set as default.
- You can also remove Repair Orders manually from the Work In Progress (WIP) screen.

# ADVANCED SETUP- WORKFLOW

The following set up tasks will help you define how your customer documents look. This includes state requirements in the footer as well as print settings, text and email message templates etc.

## General



The 'General' category is the longest category in User Options. This section will be discussed in three sections displayed below.

Click **Setup >> User Options >> General**

### Document Behavior

General Options

- Clear document when Estimate created
- Clear document when Work Order created
- Clear document when Invoice created
- Hide Costs
- Average Cost
- Auto Update Inspection due date on invoice
- Make Technician required
- Make Job Category required
- Enable QC
- Mark vehicle off site when invoice created
- Always Show All Alternative
- Enable R/O Authorization

Custom Jobs:

- Assign Work Description to Job Group
- Assign Work Description to Document

Estimate / Quote:

- Estimate
- Quote

Hide Fleet Details

Hide Warranty Details

Fleet, Warranty, Document Numbers

Document Start Number	
Invoice	1006
Credit	1000
Estimate	1009
R/O	1025
Purchase Order	1010

Document Prefix

Invoice 1

Previous Advice Notes (Months): 14

Customer Preferences

Customer Account Prefix: [ ] Length: 3

Default contact preferences

Set the default contact preferences for new customers

- Msg.  Phone  Email  Letter

Start Menu:

- Vehicle  Customer

Default Labor Rate: LAB1 - Shop Labor

Global Default Labor Rate: [ ]

Document Search

Days from today: 30

- Automatically display results when search screen is opened

Customer Custom Labels

Custom 1 Additional Driver 1

Custom 2 Additional Driver 2

- Automatically Generate License Number

License Start Number: 1

License Prefix: X

Odometer (default value)

- Miles  Kilometers

- Use Suggested Jobs
- Enable Good Better Best

## Document Behavior



**Clear Document:** Determine behaviors when you create a document. Leaving these boxes checked or unchecked will determine if the Estimate, Work Order, or Invoice clears from the screen when created or saved, or remains visible until you click Clear All. It is recommended that all three boxes are left unchecked.

**Estimate/Quote:** This option determines whether the initial document is called a Quote or an Estimate.

**Document Start Number:** Enter the starting number for Invoice, Credit, Estimate, Repair Order, and Purchase Order.

**Document Prefix:** Choose the prefix for invoices.

**Previous Advice Notes:** (Months)

This will determine the length of time to display the advice notes flags when applicable.

**Default Line Code:** This allows you to set the default Line Code for parts. When creating parts, if the Line Code box is left blank, the default code will be used.

**Start Menu:** When you open Manage Online, choose to start on either the Vehicle or Customer menu. To make adding new vehicles and customers easier, it is recommended that you select Customer.

**Default Labor Rate:** Select a Default Labor Rate if no labor rate is specified for the customer.

**Customer Custom Labels:** Each of these labels can be customized, e.g. additional driver, loyalty number, etc.

# ADVANCED SETUP- WORKFLOW

The Inspection Schedule is a separate feature from the Schedule and is used to book state or other types of inspections etc. An inspection labor code must be created as part of the Inspection Schedule set up. See Labor Codes

## Inspection Schedule

**IMPORTANT - Technicians must be set up as inspectors before you can set up the Inspection Schedule. See Technicians under Recommended Codes**

Select **Home >> Setup >> User Options >> Inspection Schedules.**

To create an inspection time slot:

Select a **Bay No.**

Check **Show Bay.**

Select a **Default Inspector** for that bay.

Enter a **Start** time.

Select **Add.**

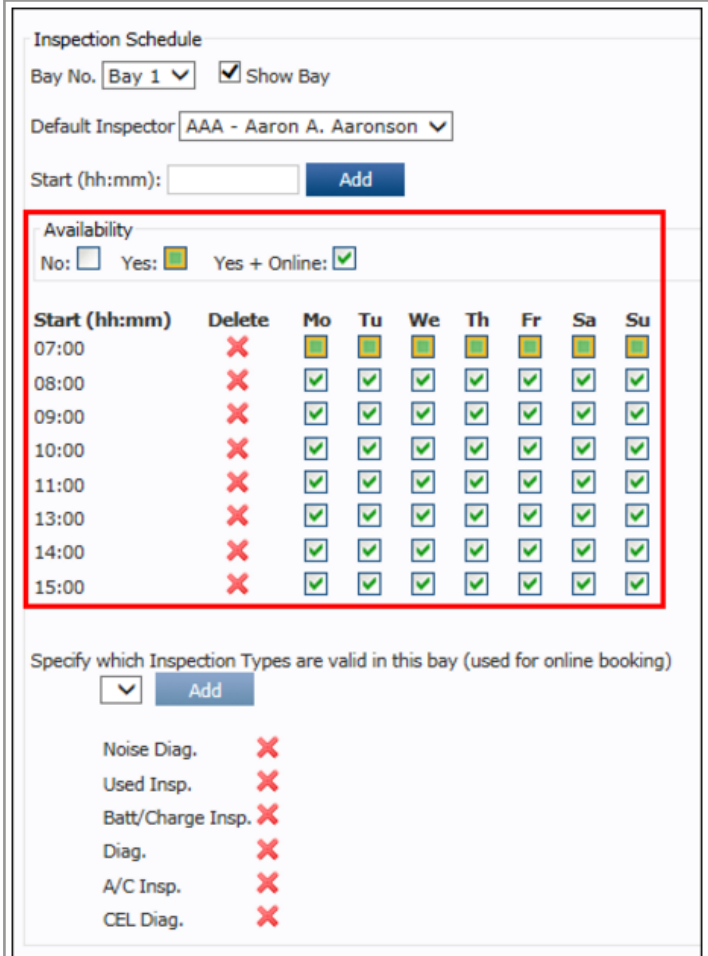
Choose which days of the week each time slot will be available by clicking the associated checkboxes.

Click the red **X** to delete the inspection time slot from the schedule.

Click **Update.**

To remove an **Inspection Type**, click the red **X** next to the Inspection type you wish to remove.

Click **Update.**



Inspection Schedule

Bay No.   Show Bay

Default Inspector

Start (hh:mm):

Availability

No:  Yes:  Yes + Online:

Start (hh:mm)	Delete	Mo	Tu	We	Th	Fr	Sa	Su
07:00	X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
08:00	X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
09:00	X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10:00	X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11:00	X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
13:00	X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
14:00	X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
15:00	X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Specify which Inspection Types are valid in this bay (used for online booking)

Noise Diag. X

Used Insp. X

Batt/Charge Insp. X

Diag. X

A/C Insp. X

CEL Diag. X

# ADVANCED SETUP- WORKFLOW

Access Control allows you to restrict access to the Option and Setting pages of your choice to only those with the password.

## Access Control

Click **Setup >> User Options >> Access Control**.

Select an option from the Page drop-down >> check the **Password protect this area** box >> check the items to password protect >> enter a **New Password**.

Notes:

- Each Page can have a unique password.
- Once a password has been created, it will display in the Current Password field.

Click **Update**.

Log out of Manage Online to complete the changes.



The screenshot shows the 'Access Control' form. At the top, the 'Page' dropdown is set to 'Inventory'. Below it, the 'Password protect this area' checkbox is checked. A section titled 'Select the items to include below' contains a list of items with checkboxes: 'My Orders' (unchecked), 'New Order' (unchecked), 'Suggested Order' (checked), 'Returns' (checked), 'Stock Movements' (checked), 'Stock Count and Adjustments' (checked), and 'Stock Usage' (checked). At the bottom, there are two password fields: 'Current Password' (empty) and 'New Password' (empty).

## Access Control- User Options

**Protecting User Options is important so that only authorized users can change things such as the Price Matrix setup, the company information that prints on Invoices, and QuickBooks accounting information.**

**Note: If User Options is not restricted, any user can open the Access Control section and view the current passwords for any password protected areas of the program.**

Select **User Options** from the **Page** drop-down >> click the Password protect this area check box >> enter a **New Password** >> click **Update**.

Now only users with the password will be able to view and access User Options, including passwords for any protected areas.

## Access Control- Codes

**Protecting Codes is important so that only authorized users can change things such as accounting information, tax rates, and codes related to shop operations.**

Select **Setup** from the **Page** drop-down >> click the Password protect this area check box >> select **Codes** >> enter a **New Password** >> click **Update**.

Now only users with the password will be able to access and edit the Code settings.



# ADVANCED SETUP- WORKFLOW

Do you sell tires to your customers via electronic catalog or your own inventory? Tire Settings allows you to define settings for tire sales, tire extras including a manufacture price matrix.

## Tire Settings



**You must create a line code before adding tires into inventory**

### Tire Sales Screen:

Select **Setup** >> click **Tire Settings**.

Set each option to your preference >> select **Update**

### Tire Markup Matrix:

The Markup Matrix allows you to set the **From** and **To** values for a tire brand.

Change any of these values simply by typing in a **Brand** >> **From Value** >> **To Value** >> choose if the **Markup** will be a **Percentage** or a specific **Dollar** amount >> type in the amount of the **Markup** >> click **Add**.

### Tire Extras:

Add a current item from inventory by typing its **Code** >> **Description** >> **Cost** >> **Sell** >> select a **Sales Class** and **PTT** >> check the include box and click **Add**.

**Include** - Show this item on the Tire Sales screen beneath the Include heading.

**Compulsory** – This item will be required and always included.

**Tire Fee** – Designates the item as a fee. The pricing is determined by the Tire Fees matrix at the bottom of the Tire Extras section.

Select **Update** to save changes.

### Tire Fees:

Enter a **Description** of the fee >> **Rim Size From** >> **Rim Size To** >> value of the **Fee** >> select if the entered value is a **% – Percent** or a **\$ – Dollar amount** >> click the checkbox and enter a **Maximum Fee Amount** (if needed) >> click **Add**.

Tire Extras								
Code	Description	Cost	Sell	Sales Class	PTT	Include	Compulsory	
				4003 - Tires	1 - Parts	<input type="checkbox"/>	<input type="checkbox"/>	<b>Add</b>
BAL	Balance one Tire	1.50	3.00		4003	2	Y	N
DIS	Tire Disposal Fee	0.00	1.00		4003	1	N	N
STM	Tire Stem	1.39	1.39		4003	4	Y	N
TAX	Tire Tax for ABC County	0.00	2.00		4003	1	N	N

Consolidate lines on invoice

# ADVANCED SETUP- WORKFLOW

Labor Time Adjustments are used to automatically increase or decrease catalog labor times by a percentage or fixed amount, based on a range and account type

## Labor Times Adjustment



**Account Type** – Account Types can be added and modified in Setup >> Code >> Account Types.

Select **Setup >> User Options >> Labor Time Adjustments**

Click the checkbox(s) to **Enable OE Labor Time Adjustments** (standard catalog labor) and/or **Enable Service Time Adjustments** (Maintenance).

Select or fill in the following fields then click **Add**:

**From** - The start of a catalog labor time hour range.

**To** - The end of a catalog labor time hour range.

**Value Type** - Choose whether to decrease or increase the catalog values that fall between the From and an To range.

**Unit** (Hours or Percent) - Choose to apply the adjustment as a percent of the original value or as a fixed amount.

**Value** – The numerical value for the percent or hours of adjustment

Continue adding adjustments for any additional ranges or account types as necessary.

Click **Update**

**Enable OE Labor Time Adjustments**

*Allows you to increase or decrease OE labor times by an amount of time or percentage, based on a range and customer account type.*

OE Labor Time Matrix

Account Type	From	To	Value Type	Unit (Hours or Percent)	Value	
{Default} ▼	1.1	3	Increase ▼	Hours ▼	0.5	<b>Add</b>
Default	0.0	1.0	↗ Increase	Hours	0.2 h	

**Enable Service Time Adjustments**

*Allows you to increase or decrease OE Service times by an amount of time or percentage, based on a range and customer account type.*

Service Time Matrix

Account Type	From	To	Value Type	Unit (Hours or Percent)	Value	
-Please Select- ▼			Increase ▼	Percent ▼		<b>Add</b>

# WORK IN PROGRESS (WIP)

## FIND OUT

- How to set up Status codes
- Identify different types of Status codes
- Set up WIP view templates
- Customize screen view for a new template

## QUICK TIP

Set up multiple templates 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.

# EXERCISE 3

## Work In Progress (WIP) Setup



You have completed setup for Primary and Advanced including statuses.

How do you set up the WIP screen to view the status and progress of all repair orders in the the shop?

## EXERCISE

Complete the steps to create statuses and work in progress views for different roles in your shop

- Setting up status codes
- Setting up WIP templates

# WORK IN PROGRESS (WIP)

## SETTING UP THE WORK IN PROGRESS SCREEN

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.

### Setting Up Status Codes

This section explains all of the types of Status codes, how to customize them, and how to create new templates for the WIP screen.

There are two types of Status codes:

**Preset Statuses** (outlined in red below)

- Cover the most typical tasks performed by most shops.
- Are identified by a black and white symbol
- Can NOT be edited

**Customizable Statuses** (outlined in green below)

- Are identified by colored squares
- CAN be edited



### Preset Code Definitions

#### Pre-Arrival

**Due In Today**-Contains both Arriving Today and Pick Up Today.

**Arriving Today**-Vehicles that are not yet onsite, but are scheduled to arrive. Once the “Due In” time has been met, the Repair Order will turn red to show it is overdue.

**Pick Up Today**-Vehicles that need to be picked up from the customer and brought into the shop.

#### In-Shop

**Awaiting Start**-Vehicles that have arrived and are waiting to enter the shop.

**In Progress**-Vehicles that have entered the shop and are currently being serviced.

**On Hold**-Vehicles that are waiting on parts, authorization or technicians in order to start/continue the work.

#### Finish

**Work Complete**-Contains Ready to Collect, Ready to Drop Off and Ready for Detailing (when detailing is required).

**Ready For Detailing**-Vehicles that are ready to be detailed.

**Ready to Collect**-Vehicles that are ready for the customer to pick up.

**Ready To Drop Off**-Vehicles that are ready to be taken from the shop to the customer.

# WORK IN PROGRESS (WIP)

## SETTING UP THE WORK IN PROGRESS SCREEN

### Setting Up Additional WIP Templates

**Creating additional templates is optional, but highly recommended, in order to get the maximum benefits from the WIP screen.**

#### Creating a New Template Name

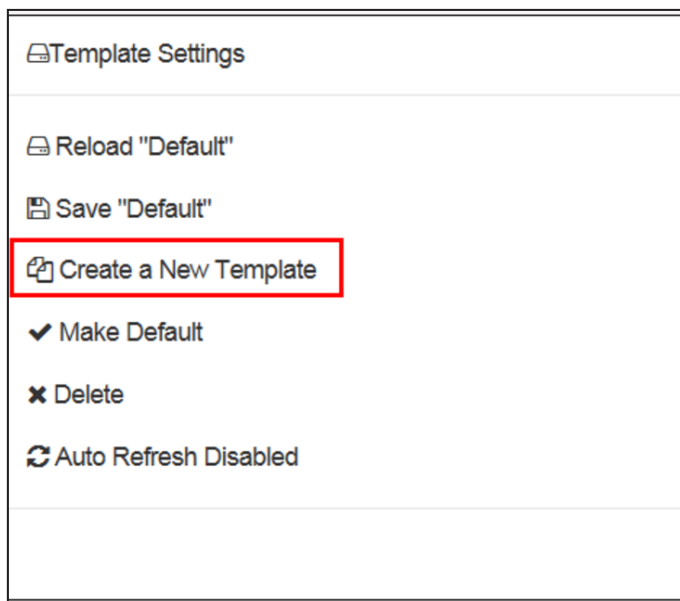
Click **WIP** (Work In Progress).

Click the **Template Settings** icon.

Click **Create a New Template**.

Enter a Template Name for the WIP screen view (example: Service Writer) >> click **OK**.

Click **Save** "{Screen name}" >> **Close**.



### Customizing the Screen View for a New Template

If you created more than one template, select the template you would like to customize.

From the WIP screen, click the **Settings** icon.

Note: On the screen that opens, the Statuses that are currently selected will have a blue background.

Click a **Status** to add it to the new template >> click any blue Status to remove it from the template >> once complete, click **Close**.

To organize the WIP screen, click and drag the blue headers on the status containers to any position on the screen.

Once the new template is organized, click the **Template Settings** icon.

Click **Save** "{Template name}"

If you want this screen to appear as the default, click **Make Default**

If you want all screens to auto-refresh every five minutes, click **Auto Refresh Disabled** so that it changes to **Auto Refresh Enabled**

Click **Close**.

The new template has been saved and can now be selected from the WIP drop-down menu.

# WORK IN PROGRESS (WIP)

## SETTING UP THE WORK IN PROGRESS SCREEN

### Examples of Customized WIP Screens



#### Shop View Statuses used:

Awaiting Start, In Progress, Work Complete, Ready For Detailing

The screenshot shows a 'Shop View' interface with a search bar and a dropdown menu. It is divided into four columns representing different work statuses:

- Awaiting Start | 3**: Contains three items, including a Honda Accord EX-L (Out: Tuesday) and a Honda Civic EX (Out: OverDue Tag: 005).
- In Progress | 3**: Contains three items, including a Ford Fusion SEL (Out: Tuesday Tag: 003), a GMC P3500 Base (Out: Tuesday Tag: 006), and an Infiniti FX50 Base (Out: Tuesday).
- Work Complete | 1**: Contains one item, an Isuzu Axiom Base (Out: Tuesday).
- Ready For Detailing | 1**: Contains one item, an Isuzu Axiom Base (Out: Tuesday).

#### Shop Manager Statuses used:

Due In Today, Awaiting Start, On Hold, In Progress, Work Complete, Ready For Detailing

The screenshot shows a 'Shop Manager' interface with a search bar and a dropdown menu. It is divided into five columns representing different work statuses:

- Due In Today | 1**: Contains one item, a Chevrolet Corvette Base (In: OverDue).
- Awaiting Start | 2**: Contains two items, including a Honda Accord EX-L (Out: Tuesday) and a Honda Civic EX (Out: Saturday Tag: 005).
- In Progress | 3**: Contains three items, including a Ford Fusion SEL (Out: Tuesday Tag: 003), a GMC P3500 Base (Out: Tuesday Tag: 006), and an Infiniti FX30 Base (Out: Tuesday).
- Work Complete | 2**: Contains two items, including a Saturn SL1 Base (Out: Tuesday) and an Isuzu Axiom Base (Out: Tuesday).
- Ready For Detailing | 1**: Contains one item, a Saturn SL1 Base (Out: Tuesday).
- On Hold | 1**: Contains one item, a Volvo 244 GL (Out: Tuesday).

# WORK IN PROGRESS (WIP)

## SETTING UP THE WORK IN PROGRESS SCREEN

### Examples of Customized WIP Screens



#### Service Writer Statuses used:

Confirmed, Re Schedule, In Bay, Wait on Auth, Wait on Parts, Wait on Tech, Awaiting Work Start, Out for Test Drive, Work Complete,

The screenshot displays a Service Writer WIP screen with a search bar and filter options. The screen is divided into several columns representing different statuses:

- Confirmed | 2**: Lists two vehicles: GMC Canyon SLE and GMC Sierra 1500 SL. Both are scheduled for Tuesday.
- Awaiting Work Start | 0**: No vehicles in this status.
- Wait on Tech | 1**: Lists one vehicle: Volvo 244 GL. Scheduled for Tuesday.
- In Bay | 3**: Lists three vehicles: Ford Fusion SEL, GMC P3500 Base, and Infiniti FX30 Base. Scheduled for Tuesday.
- Work Complete | 2**: Lists two vehicles: Saturn SL1 Base and Isuzu Axiom Base. Scheduled for Tuesday.
- Re Schedule | 1**: Lists one vehicle: Chevrolet Corvette Base. Status is OverDue.
- Wait on Parts | 0**: No vehicles in this status.
- Wait on Auth | 0**: No vehicles in this status.
- Out for Test Drive | 0**: No vehicles in this status.

#### Technician Statuses used:

Awaiting Start, Wait On Tech, Awaiting Work Start, Awaiting Parts, In Bay, Out for Test Drive, Quality Control, Work Complete,

The screenshot displays a Technician WIP screen with a search bar and filter options. The screen is divided into several columns representing different statuses:

- Awaiting Work Start | 1**: Lists one vehicle: Infiniti FX30 Base. Scheduled for Tuesday.
- Wait on Parts | 0**: No vehicles in this status.
- In Bay | 2**: Lists two vehicles: Ford Fusion SEL and GMC P3500 Base. Scheduled for Tuesday.
- Quality Control | 0**: No vehicles in this status.
- Work Complete | 2**: Lists two vehicles: Saturn SL1 Base and Isuzu Axiom Base. Scheduled for Tuesday.
- Wait on Tech | 1**: Lists one vehicle: Volvo 244 GL. Scheduled for Tuesday.
- Out for Test Drive | 0**: No vehicles in this status.



# ADVANCED SETUP-ACCOUNTING

## FIND OUT

- Edit/Add Sales Class codes
- Define Payment Methods
- Define Payment Terms
- Define Opening Balances for customers and/or vendors

## QUICK TIP

- Confirm the default settings already in Manage Online. You may not need to make any changes to these setup areas

# EXERCISE 4

## Advanced Setup: Accounting

What areas can you customize for accounting purposes?

### Exercise:

Confirm defaults or customize this shop accounting information prior to advanced setup. These areas will help set more specific accounting requirements.

**Sales Class Codes:** Accounting codes for sales classes.

Example: Labor Sales, Purchases, Tires, Inspection Labor, Sublet

Manage Online Default:

4000	Parts Sales
4001	Labor Sales
4002	Inspection Labor
4003	Tires Sales
5000	Purchases

**Default Sales Class Codes:** Which sales class code will you define as your default for sales categories?

Manage Online Default:

Parts	4000 - Default Sales
Labor	4001 - Labor Sales
Shop Supplies	4000 - Default Sales
Fixed Price	4000 - Default Sales
State Inspection	4002 - Inspection Labor
Excess	4000 - Default Sales
Discount	4000 - Default Sales
Purchases	5000 - Purchases
Hazmat	Blank
Price Adjustment	Blank

**Payment Terms:** What are the payment terms for your shop?

Examples: 30, 60, 90 Days Account  
Time of Service

Descriptions

Number of Days

**Payment Methods:** What are the payment methods accepted in your shop?

Examples: Cash, Debit, Mastercard, Visa, Check.

**Account Types:** What account types does your shop cater to?

Examples: Individual on Account, Internal, Business, Insurance etc.

# ADVANCED SETUP-ACCOUNTING

The following setup tasks will help you speed up the ticket writing process as well as keep your inventory, accounting and marketing efforts organized.

## Sales Class Codes



**Sales Class Codes** are numbers that represents a class of sales or stream of income for your business. These numbers are used to better organize sales reports when filing taxes. (Example: 4001 for Labor Sales)

Click **Setup >> Codes >> Sales Class Codes**.

Enter a **Sales Class Code**, **Description**, and select a **Type** >> click **Update**.

**Description:** A description of the sales class code. (Example: Default Sales)

**Type:** Indicates whether a sales class code is Sales Type or a Purchase Type.

Sales Class Code	Description
4000	Default Sales
4001	Labor Sales
5000	Purchases

## Default Sales Class Codes

To set Default Sales Class Codes, select **Setup >> User Options >> Default Sales Class Codes** >> apply a default for each category >> **Update**.

Category	Default Sales Class Codes
Parts	4000 - Default Sales
Labor	4001 - Labor Sales
Shop Supplies	4000 - Default Sales
Fixed Price	4000 - Default Sales
State Inspection Schedule	4002 - Inspection Labor
Deductible	4000 - Default Sales
Discount	4000 - Default Sales
Purchases	5000 - Purchases
Hazmat	4000 - Default Sales
Price Adjustment Line	4000 - Default Sales

# ADVANCED SETUP-ACCOUNTING

## Opening Balances



Follow the process below if you have customers and vendors with an open account balance.

Click **Setup >> User Options >> Opening Balances**.

Select whether the account is **Sales** or **Purchase** >> enter the **Account Number** >> **Reference** number >> **Balance** amount.

**Sales:** Marks this as a customer account. This is what the customer will owe the shop.

**Purchase:** Marks this as a vendor account. This is what the shop will owe the vendor.

**Account Number:** The Customer ID or Vendor ID of the account. Enter this ID, or use the search options next to the field.

**Reference:** This identifies the transaction. This will show as Ref in various reports.

**Balance:** The dollar amount of the Opening Balance.

Click **Add**.

Confirm all information >> click **Post**.

Notes:

- Once an Opening Balance is posted, it cannot be removed.
- If the information is incorrect, click the red X to delete the Opening Balance before it is posted, then create a new entry.

Click **OK** to confirm creating opening balance

Click **OK**.

The Opening Balance information will now be included in the relevant reports.

Opening Balances

Date: 11/16/2015

Sales  Purchase

Account Number:  [Customer Search Ve](#)

Reference:

Balance:

**Add**

Type	Account	Reference	Balance
Sales	JOH001	BAL1115	1445

**Post**

# ADVANCED SETUP-ACCOUNTING

## Product Group Codes

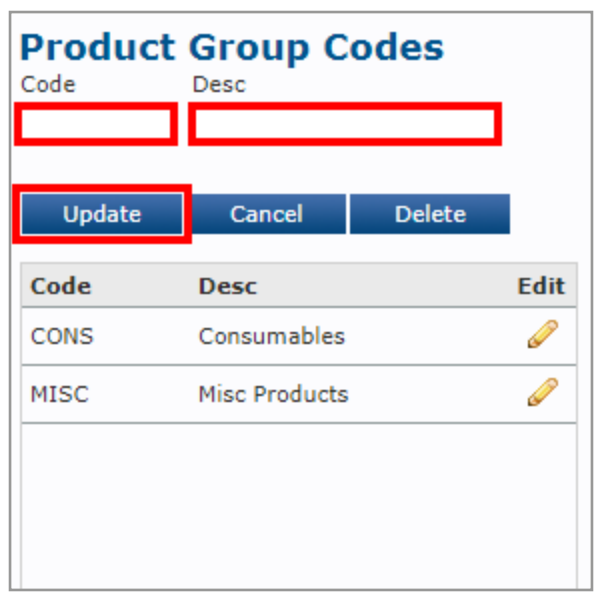
**Product Group Codes** allow users to set up categories for better inventory management and reporting.

Click **Setup >> Code >> Product Group Codes**.

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

**Code:** One to four digits that identify an Product Group in the program. (Example: CONS)

**Desc:** Description of the Product Group. (Example: Consumables)



The screenshot shows the 'Product Group Codes' form. At the top, there are two input fields labeled 'Code' and 'Desc', both highlighted with red boxes. Below these fields are three buttons: 'Update' (highlighted with a red box), 'Cancel', and 'Delete'. Underneath the buttons is a table with columns 'Code', 'Desc', and 'Edit'. The table contains two rows: 'CONS' with 'Consumables' and 'MISC' with 'Misc Products'. Each row has a pencil icon in the 'Edit' column.

## Account Types

**Account Types** are used to create reports for work carried out on specific customer categories.

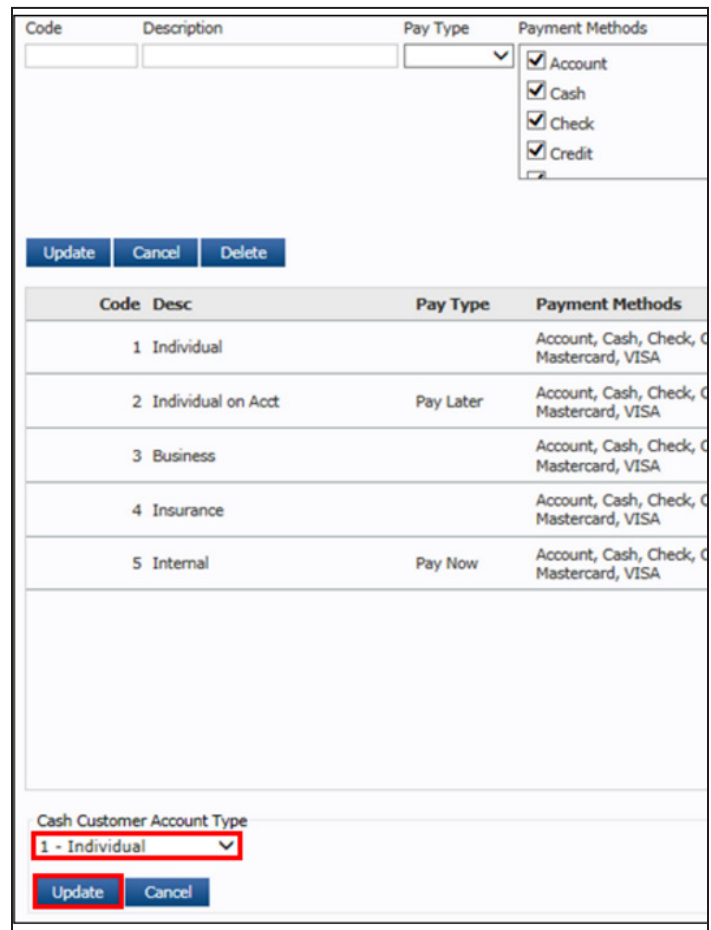
Click **Setup >> Codes >> Account Types**.

Enter the **Code**, **Description**, and **Pay Type** >> choose the acceptable methods of payment >> click **Update**.

Note: In order to process partial payments, the **Pay Type** must be set to **Pay Later** or left blank.

Select the **Cash Customer Account Type** >> click **Update**.

This will be the default **Account Type** for any **Work** document where there is no customer account assigned.



The screenshot shows the 'Account Types' form. At the top, there are four input fields: 'Code', 'Description', 'Pay Type', and 'Payment Methods'. The 'Payment Methods' field is a dropdown menu with a list of options: 'Account', 'Cash', 'Check', and 'Credit', all of which are checked. Below these fields are three buttons: 'Update', 'Cancel', and 'Delete'. Underneath the buttons is a table with columns 'Code', 'Desc', 'Pay Type', and 'Payment Methods'. The table contains five rows: '1 Individual', '2 Individual on Acct', '3 Business', '4 Insurance', and '5 Internal'. Below the table is a section labeled 'Cash Customer Account Type' with a dropdown menu showing '1 - Individual' selected and highlighted with a red box. At the bottom are two buttons: 'Update' and 'Cancel'.

# ADVANCED SETUP-ACCOUNTING

## Payment Terms



Used to predefine payment terms for vendors as well as customers. Setting these up will allow a repair shop to quickly select the specific terms for each transaction.

Click **Setup >> Codes >> Payment Terms**.

Enter a **Code**, **Description** and **Number of Days** >> click **Update**.

**Code:** One to three digits that identify a code within the program. (Example: CHK)

**Description:** A description of the payment terms. (Example: Check)

**Number of Days:** Number of days allowed for the customer to pay after the invoice was closed.

Code	Desc	NoDays	Edit
30	30 Days Account	30	
CHK	Check	0	
CSH	Cash	0	
TOS	Time of Service	0	

## Payment Methods



**Payment Methods** are used to set up accepted payment methods such as Account, Cash, Visa, Mastercard, etc.

Click **Setup >> Codes >> Payment Methods**.

To manually add a payment method, enter a **Method** >> click **Update**.

Examples: Cash, MasterCard, Visa, Check.

Work Schedule

### Payment Methods

Default Payment Method

Update Cancel

Method

# ADVANCED SETUP-INVENTORY

## FIND OUT

- Define Line Codes
- Create Stock Adjustment Reasons
- Create Return Reasons
- Create Account Codes

## QUICK TIP

- Use Line codes to help categorize and track your parts inventory by brand or category etc.

# EXERCISE 5

## Advanced Setup: Inventory



What areas can you customize for parts inventory purposes?

### Exercise:

Confirm defaults or customize this shop inventory information prior to advanced setup. These areas will help set more efficient parts inventory requirements.

**Line Codes:** Do you stock a range of parts inventory?

Example: Labor Sales, Purchases, Tires, Inspection Labor, Sublet

Manage Online Default:

AAA	Default Part
ACS	Air Conditioning
AFT	Air Filter
ATF	Auto Trans Fluid
BAT	Battery
BLB	Bulb
BRK	Brake
CFL	Cabin Air Filter
CLT	Coolant
CMP	Clamp
FLD	Fluid
FLT	Filter
HDW	Hardware
OFL	Oil Filter
OIL	Oil Item
RFG	Refrigerant
SBO	Synthetic Blend Motor Oil
SPK	Spark Plug
SYN	Synthetic
STE	AC Oil
TIR	TIRE
WIP	Wipers

**Stock Adjustment Reasons:** Do you stock a range of parts inventory? Stock Adjustment Reasons allow you to set your own custom reasons for stock adjustments

Examples: Damaged, Found etc.

Descriptions

**Return Reasons:** Do you want to track core returns? Return Reason Codes allow you to set up possible reasons why parts would be returned

Examples: CoreReturn, Faulty, Not Required

Descriptions

**Account Codes:** Do you stock a range of parts inventory? Account Codes allow users to set up categories for better inventory management and reporting.

Examples: Consumables, Miscellaneous Products, Shop Supplies, Tires, DISC

Descriptions



# ADVANCED SETUP-INVENTORY

If you stock parts and other inventory in your shop you can enter them manually as shown below or import your inventory via spreadsheet. See article link.

## ADDING PARTS TO INVENTORY

Click **Setup >> Parts**

**Fill in the following required information:**

**Part No:** Enter the part number that is specific to the item.

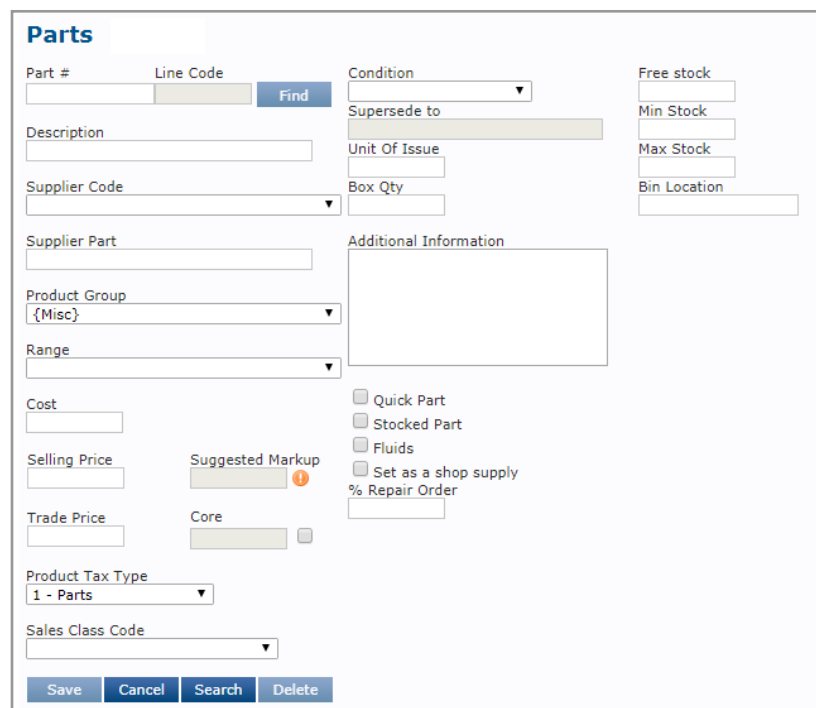
**Description:** Enter a description, or the name of the part.

Note: The Part No and Description will appear on the Invoice.

**Supplier Code:** Select the vendor.

**It is highly recommended to fill in any additional available information:** Click article link for details.

Click **Save**.



The screenshot shows a 'Parts' form with the following fields and options:

- Part #**: Input field
- Line Code**: Input field
- Find**: Button
- Condition**: Dropdown menu
- Free stock**: Input field
- Description**: Input field
- Supersede to**: Input field
- Min Stock**: Input field
- Supplier Code**: Dropdown menu
- Unit Of Issue**: Input field
- Max Stock**: Input field
- Box Qty**: Input field
- Bin Location**: Input field
- Supplier Part**: Input field
- Additional Information**: Text area
- Product Group**: Dropdown menu (value: {Misc})
- Range**: Dropdown menu
- Cost**: Input field
- Quick Part**: Checkbox
- Selling Price**: Input field
- Suggested Markup**: Input field with a warning icon
- Stocked Part**: Checkbox
- Trade Price**: Input field
- Core**: Input field with a checkbox
- Fluids**: Checkbox
- Set as a shop supply**: Checkbox
- % Repair Order**: Input field
- Product Tax Type**: Dropdown menu (value: 1 - Parts)
- Sales Class Code**: Dropdown menu

Buttons at the bottom: **Save**, **Cancel**, **Search**, **Delete**

# ADVANCED SETUP-INVENTORY

The following codes are helpful for managing inventory movements within in your shop, including parts and core returns.

## Stock Adjustment Reasons

**Stock Adjustment Reasons** allow users to set custom reason codes for stock adjustments.

Click **Setup >> Codes >> Stock Adjustment Reasons**.

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

**Code:** One to four digits that identify a code within the program. (Example: DMG)

**Desc:** A description of the reason. (Example: Damaged)



Code	Desc	Edit
DMG	Damaged	
F	Found	
NDG	Not Damaged	
NF	Not Found	

## Return Reason Codes

**Return Reason Codes** allow the user to set up specific parts return codes including core returns.

Click **Setup >> Code >> Return Options**.

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

**Code:** One to three digits that identify the reason code within the program. (Example: 01)

**Description:** A description of the reason code. (Example: Faulty, Core, Not Required etc.)

**Reduce stock:** (optional) Check this box to automatically reduce stock count of the the part this Return Reason has been applied to.



Code	Description	Reduce stock
CORE	Core Return	<input type="checkbox"/>
01	Faulty	
02	Not Required	

# ADVANCED SETUP-INVENTORY

Enabling Core Tracking allows you to populate cores on a work document and track core returns including taxes depending on various state requirements.

## Enabling Core Tracking



**Core Tracking allow users to bill, track, refund and return cores.**

Click **Setup >> Code >> Return Options.**

Create a **Return Reason Code** for CoreReturn by entering a **Code** (e.g., Core) and **Description** (e.g., Core Return) then clicking **Update**.

Verify that **Enable Catalog Cores** checkbox is selected >> click **Update**.

Make any necessary modifications to the **Core Options** then click **Update**:

### Show core/surcharge credits on documents -

Determines whether you will leave the core charge and core return line items on the customer's printed documents.

Note: This is required in some states.

### The default tax code for core/surcharge credit:

If your state requires that the taxes for the core are not returned to the customer when the core is credited, you should select a non-taxable tax code. If your state requires taxes to be returned to the customer when the core is credited, chose a taxable tax code.

## Adding/Removing Core Charges



**See article link for:**

Adding a core charge to an Inventory Part

Adding a core charge to a document from an integrated parts catalog

Manually adding a core charge to a document

Removing/crediting a core charge

77	Damaged
CORE	Core Return
<input checked="" type="checkbox"/> Enable Catalog Cores	
<input type="button" value="Update"/>	
<b>Core Options</b>	
Show core/surcharge credits on documents <input checked="" type="checkbox"/>	

# ADVANCED SETUP-INVENTORY

The following codes are helpful for categorizing inventory within in your shop.

## Line Codes



**Line Codes** allow users to set up a specific code that represents a part manufacturer or part category. These codes are used to better classify inventory. Many customers choose to use lines codes to define a part category such as Brk - Brakes. Or Batt - Battery.

Click **Setup >> Codes >> Line Codes**.

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

**Code:** One to three digits that identify a code within the program. (Example: AAA)

**Desc:** A description of the line code. (Example: Default Part)

Line Codes are three digits long, and can include letters and numbers. Examples: AutoZone (AZO), Dayco (DAY)

Note: The Default Line Code will be used for any part added without a Line Code selected.

Code	Desc	E
AAA	Default Part	
DUN	Imported Line Code	
GDY	Imported Line Code	
KEL	Imported Line Code	
TIR	TIRE	

## Range Codes



**Range Codes** allow users to set up separate range codes for better inventory management.

Click **Setup >> Code >> Range Codes**.

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

**Code:** One – ten digits that identify a range code in the program. (Example: AAA)

**Desc:** Description of the range code. (Example: Default)

# THIRD PARTY INTEGRATIONS

## FIND OUT

- How to set up QuickBooks Online or Desktop
- How to set up PaySafe
- How to set up Demandforce or MechanicNet

## QUICK TIP

- Consult your tax professional to confirm you are using the correct accounting information before setting up QuickBooks integrations.

# EXERCISE 6

## 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
- Demandforce
- MechanicNet
- PaySafe

# THIRD PARTY INTEGRATIONS

## QUICKBOOKS ONLINE

### Sales Class Codes



All Sales Class Codes need to be set up in both Manage Online and in the QuickBooks Online chart of accounts. See Sales Class Codes on page 10 of this set up guide.

#### IN ALLDATA MANAGE ONLINE

**Sales Class Codes** can be created and modified under **Setup >> Codes >> Sales Class Codes Maintenance**.

It is not necessary to match your Sales Class Codes from Manage Online to QuickBooks because the export will create their own income accounts in QuickBooks.

The codes can consist of numbers and letters and have a maximum length of eight characters.

Once the Sales Class Codes have been added to Manage Online, the **Default Sales Class Codes** can be set under **Setup >> User Options >> Default Sales Class Codes**.

This will assign the codes to the relevant transaction lines automatically when creating an invoice.

Note: Sales Class Codes can still be manually assigned to individual parts and labor items instead of using the defaults.

#### IN QUICKBOOKS ONLINE

Sales Class Codes are typically created as an “Income” account type.

#### ENABLING QUICKBOOKS ONLINE



Click **Setup >> User Options >> QuickBooks**.

Click the **Enable QuickBooks Online** check box.

Enter your **QuickBooks Online Company ID >>** click **Update**.

Notes:

- Your **QuickBooks Online Company ID** is assigned to your shop by QuickBooks. This will link your program to QuickBooks Online.
- When entering the **QuickBooks Online Company ID**, do not include spaces.

The page will reload. Click the **Connect to QuickBooks** button that displays.

A new window will open that will allow you to finish connecting Manage Online to QuickBooks Online.

Click the **Expense Account “...”** button.

In the Accounts List popup window, select an **Expense Account >>** click **Update**.

Select which Payment Method will be assigned in QuickBooks when a specific Payment Type is used in Manage Online.

Confirm the **Current Status** is **Connected** and the **Expense Account** is selected >> click **Update**.

# THIRD PARTY INTEGRATIONS

## QUICKBOOKS DESKTOP PRO 2010 AND ABOVE

### Sales Class Codes



All Sales Codes (and Expense Codes if you intend to export Accounts Payable information) need to be set up in both ALLDATA Manage Online and in the QuickBooks chart of accounts. See Sales Class Codes on page 10 of this setup guide.

#### IN ALLDATA MANAGE ONLINE

**Sales Class Codes** can be created and modified under **Setup >> Codes >> Sales Class Codes Maintenance**.

It is not necessary to match your Sales Class Codes from Manage Online to QuickBooks because the export will create their own income accounts in QuickBooks.

The codes can consist of numbers and letters and have a maximum length of eight characters.

Once the Sales Class Codes have been added to Manage Online, the **Default Sales Class Codes** can be set under **Setup >> User Options >> Default Sales Class Codes**.

This will assign the codes to the relevant transaction lines automatically when creating an invoice.

Note: Sales Class Codes can still be manually assigned to individual parts and labor items instead of using the defaults.

#### IN QUICKBOOKS DESKTOP

Create new accounts, or note existing account names, for the following types of accounts:

- Accounts Receivable
- Payment Received
- State Taxes Payable
- Accounts Payable

#### ENABLING QUICKBOOKS DESKTOP



Click **Setup >> User Options >> QuickBooks**.

Check the **Enable QuickBooks Desktop Export** box.

#### ENTER QUICKBOOKS EXPORT ACCOUNT CODES

##### Notes:

- If subaccounts have been used in QuickBooks, the main account and subaccount must be separated by a colon when entering the information into ALLDATA Manage Online. (Example: Taxes:State Taxes)
- The Accounts Receivable, Payment Received, State Taxes Payable & Accounts Payable account names must match your QuickBooks Desktop Company File.

Input your **QuickBooks Desktop Export Account Codes** and **Class**.

QuickBooks	
<input type="checkbox"/> Enable QuickBooks Online	<input checked="" type="checkbox"/> Enable QuickBooks Desktop Export
Accounts Receivable	Accounts Receivable
Payments Received	Undeposited Funds
State Taxes Payable	State Taxes Payable
Tax Vendor	State of California BOE
Accounts Payable	Accounts Payable
Default Sales Class Code	4001
Default Sales Account	General
Class	a



# THIRD PARTY INTEGRATIONS

## PAYSAFE

Use PaySafe with PayGuardian software to process customer credit or debit cards. Before enabling and using PaySafe Payment Processing, contact a PaySafe representative.

Click on this article icon to complete an application. 

### ENABLING PAYSAFE PAYMENT PROCESSING



Click **Setup >> User Options >> Card Payments**.

Click the **Enable PayGuardianWEB** check box.

Click **Test Connection**.

In **Available Payment Methods**, select the credit or debit cards that your shop accepts >> click **Update**.



Card Payment

**PaySafe Solutions**  
with PayGuardianWEB software

Enable BridgePay/PayGuardianWEB

Please speak with a PaySafe Solutions representative before enabling this feature in Manage Online.



1. From the Invoice Confirmation screen, select a credit or debit card payment method.
2. Swipe the card through the payment terminal.
3. The card information is verified by PayGuardianWEB and will be processed.
4. You are immediately returned to ALLDATA Manage Online to print to the invoice.

# THIRD PARTY INTEGRATIONS

## INTUIT DEMANDFORCE & MECHANICNET

Intuit Demandforce and MechanicNet are subscription-based programs used to help small shops dramatically strengthen their customer communication and marketing. Using customer and vehicle information from your Manage Online database, Demandforce and MechanicNet help with:

Communication: surveys, referrals, automated texts

Marketing: local ads, targeted offers, business directories, search rankings, results

Reputation: certified reviews, review management, reputation builder, business profile, social strategy

### Integrating with Intuit Demandforce



Click **Setup >> User Options >> Intuit Demandforce.**

Contact Intuit Demandforce to subscribe to Demandforce and have them add your Manage Online Company ID to your Demandforce account.

Click the **Enable Intuit Demandforce Integration** check box >> **Update.**

### Integrating with MechanicNet



Click **Setup >> User Options >> MechanicNet.**

Contact MechanicNet to subscribe, and have them add your Manage Online Company ID to your MechanicNet account.

Click the **Enable MechanicNet Integration** check box >> **Update.**

Intuit Demandforce

Already an Intuit Demandforce customer? Use this screen to enable your integration with Demandforce. Please note that you will need an active Demandforce account to use this feature. Please speak with your Demandforce representative before attempting to use this feature.

Not yet an Intuit Demandforce customer? Demandforce is an automated marketing solution built to fuel the success of your shop. It syncs with ALLDATA Manage Online software to help you communicate with customers, improve your online reputation and increase revenue for your shop.

To see a demo today: Call (800) 210-0355 or visit [www.demandforce.com](http://www.demandforce.com) for more information.

Enable Intuit Demandforce Integration

**Company ID**    **awalker**    Give this to your Intuit Demandforce implementor to link your accounts.

**Initial Upload**

**Last Update**

**History**

[Resend Data](#)

MechanicNet

MechanicNet Integration  
Expert Automotive Marketing

Already a MechanicNet customer? Contact the MechanicNet Tech Support team for assistance with this activation process.

Not a MechanicNet customer? MechanicNet offers a full suite of customer marketing solutions designed specifically for the automotive industry. We sync with ALLDATA Manage Online to automatically acquire, retain and recapture customers.

For activation assistance or to learn more, call (877) 632-4638 or visit [mechanicnet.com](http://mechanicnet.com).

Enable MechanicNet Integration

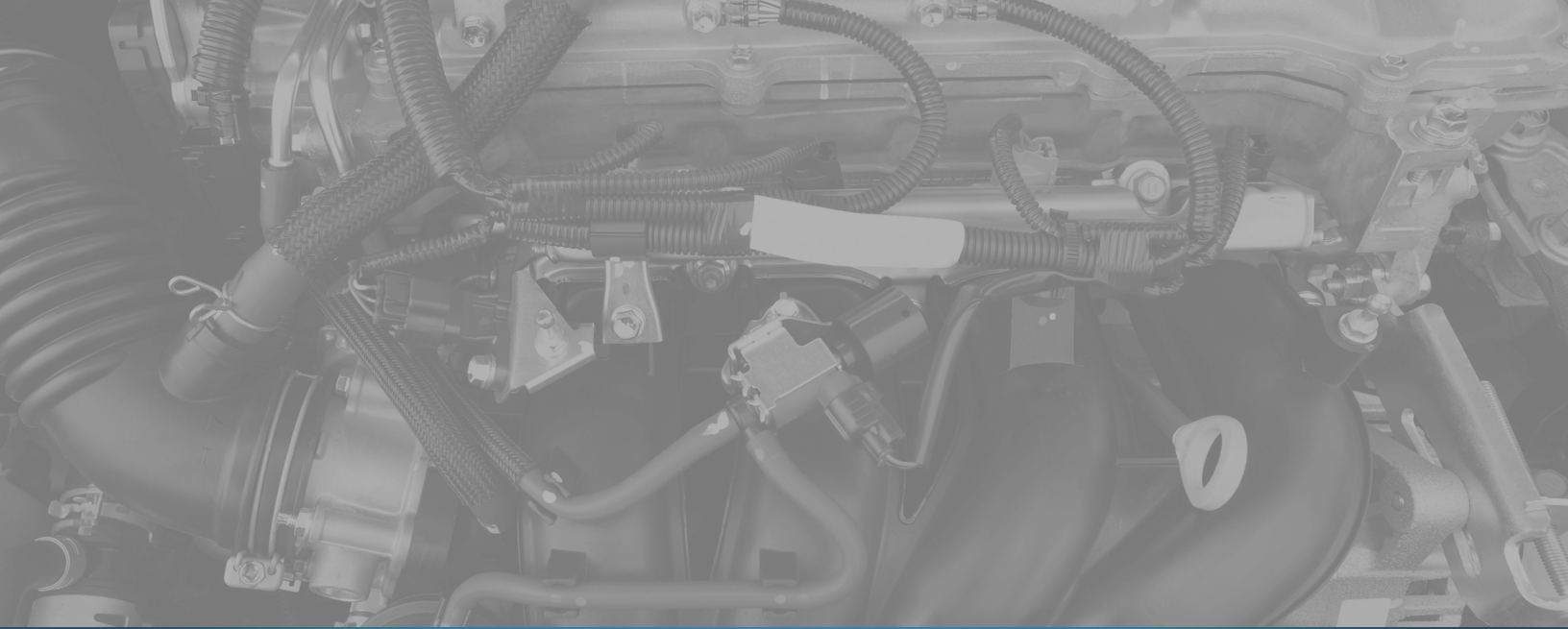
**Company ID**    **awalker**    Give this to your MechanicNet representative to link your accounts.

**Initial Upload**

**Last Update**

**History**

[Resend Data](#)



©2018 All rights reserved. ALldata LLC. ALldata, ALldata Repair and ALldata Manage are registered trademarks of ALldata LLC. AutoZone is a registered trademark of AutoZone Parts, Inc. myCARFAX is a registered trademark of CARFAX, Inc. Demandforce and Quickbooks Online are registered trademarks of Intuit, Inc. MechanicNet is a copyright of MechanicNet Group. All other marks are property of their respective owners.