Quick Reference Manual

MUFFLER MANAGER
SERVICE PRO

Computer Information System

Version 1

INDEX

From Main Menu: (Everyday)

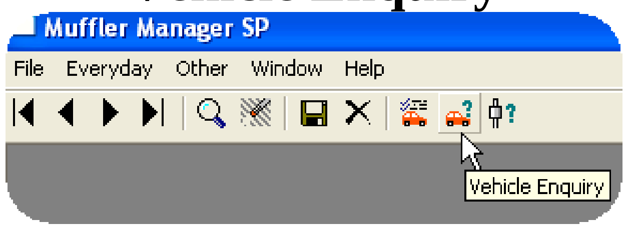
Parts Look Up

TYPE IN # USE (F9) TO LOAD AND (F7, F8) TO SCROLL FORWARD OR BACKWARD

Vehicle Profile

CLICK ON CATALOG, MODEL, YEAR AND ADD. SELECT ITEMS, IF YOU'RE ON AN INVOICE CLICK OK

Vehicle Enquiry



TYPE IN REGO (F9) THIS WILL GIVE YOU ALL DETAIL

(TAB) KEY WILL TAKE YOU THROUGH THE DOCUMENT
(SHIFT + TAB) WILL TAKE YOU BACK

IN STOCK MAINTENANCE: AFTER TYPING IN THE PART # HIT THE **(F9)** KEY THIS WILL LOAD THE PART # FOR YOU TO VIEW DISCRIPTION, PRICING EX...

(F7) AND **(F8)** WILL ALLOW YOU TO SEARCH UP OR DOWN FOR THE PART # YOU WANT

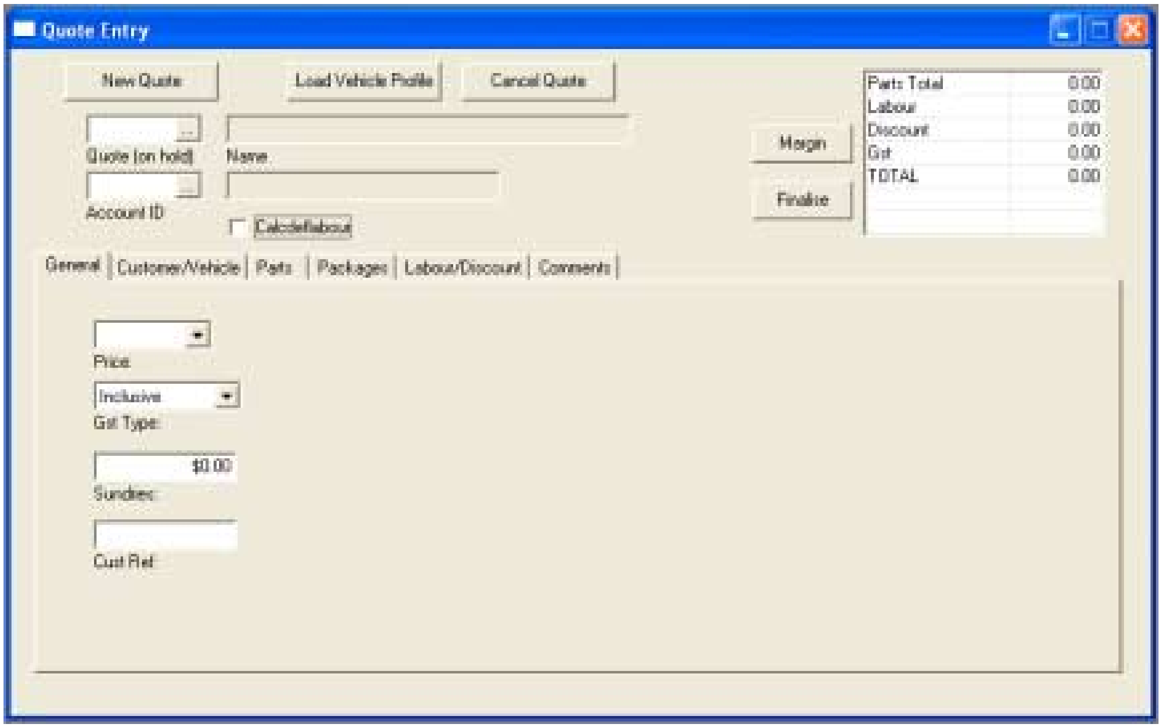
(F5) WILL CLEAR CURRENT OR ADD A NEW RECORD

(F2) WILL SAVE

(SHIFT + F2) WILL DELETE THE CURRENT WORK

Raise a Quote:

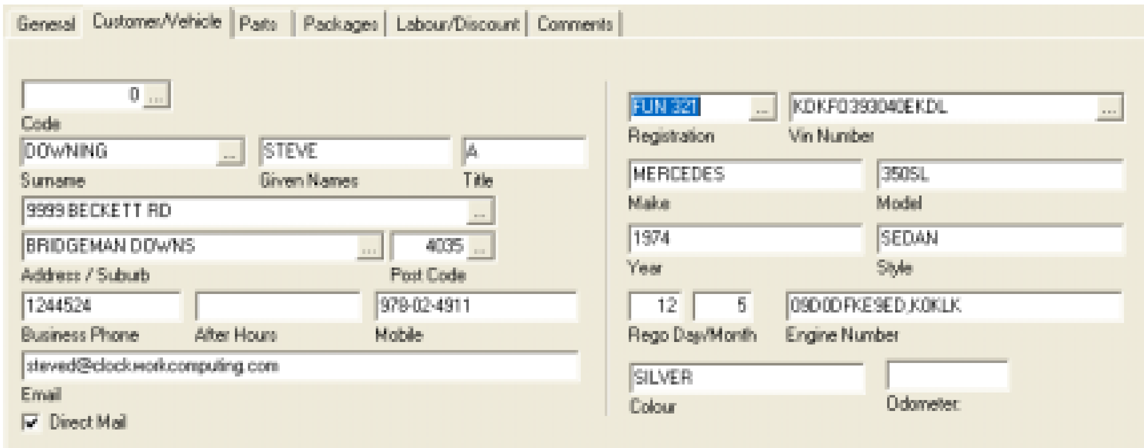
"Remember to Quote + <u>GST</u> on Quotes"



Click on **Everyday**
Click on **customer Quote**
Click on **New Quote** (or **Quote on hold** or **Account ID** If you know it's on hold).

Raise a Quote: (cont'd)

Customer/Vehicle:



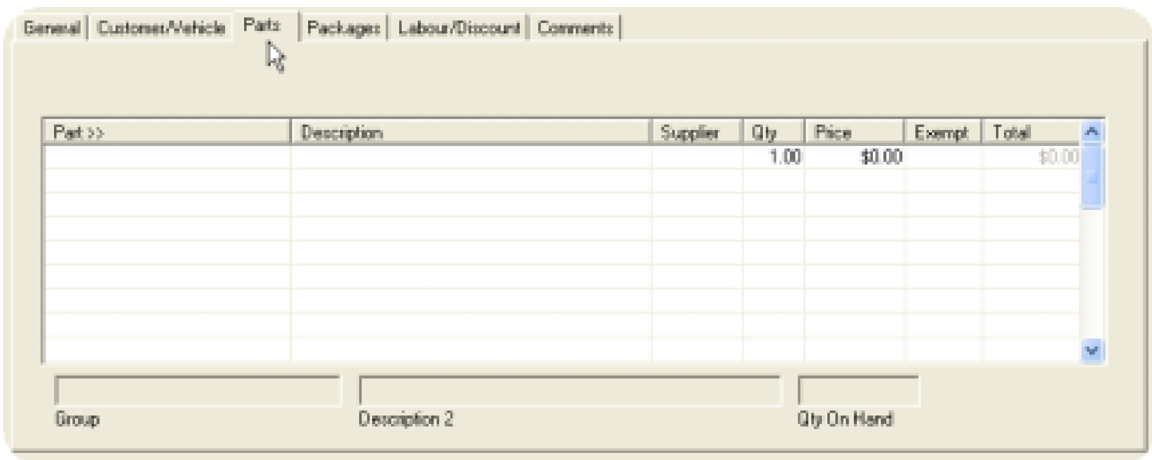
Customer/Vehicle:

Click on **customer/vehicle**

Click on **surname,** enter Surname, then click on drop down box in Surname area, find Surname and OK, if not their cancel and tab through to suburb. After entering suburb click on drop down box to retrieve post code, tab through to finish Customer details.
Click on registration, type in Rego. then click on drop down box in Rego. area, find Rego. and OK, if not their cancel and tab through to finish.

Raise a Quote: (cont’d)

Parts:



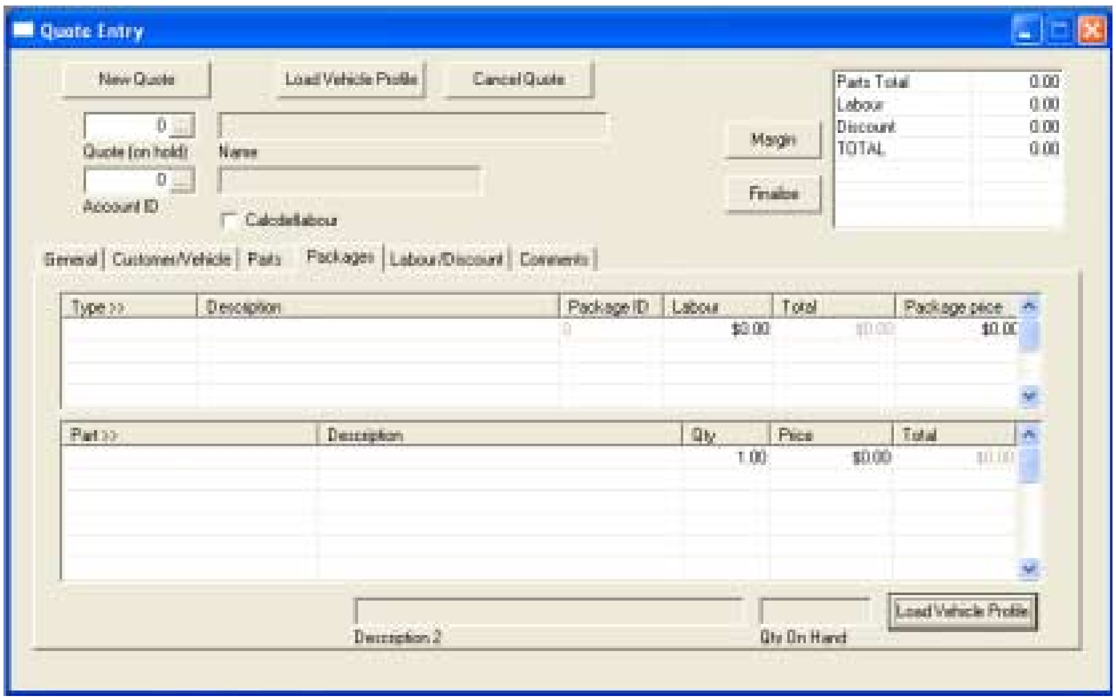
Parts:

Click on line under **parts>>** – type in parts if you know the part number
“Double click on part No. to delete if wrong No. USE THE SHIFT F2 TO DELETE LINE IF WRONG PART No. USED” or F5 to Clear if invalid No. (not a No. in system)
Click on **load vehicle profile** if needed to retrieve part number
Click on **model**, type in model example falcon, commodore, and magna
Click **OK**
Click on **year** and scroll for right year
Click on **catalog type**, type in - example (brakes) or scroll up or down
Click **add**
Click which brake parts you need – If other parts needed like exhaust, go back to **catalog type** and click standard exhaust then click add again.
When finished **click ok.**

Packages

How to use Packages:

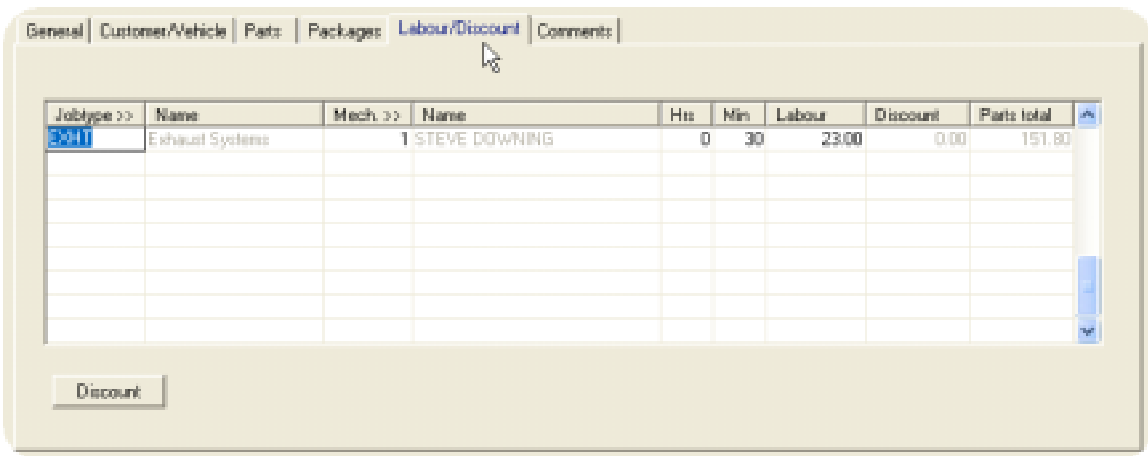
If you want to input a Package, example $79 oil change or $99 brake reline, click on Packages.



Click on Package
Click on type >>
Arrow up or down to pick package
Click on package
Click ok
Click below on part >> or Load Vehicle Profile bottom right “only”
Add parts that are need – tab across
Click ok
Continue on with Labour / Discount

Raise a Quote: (cont'd)

Labour/Discount:

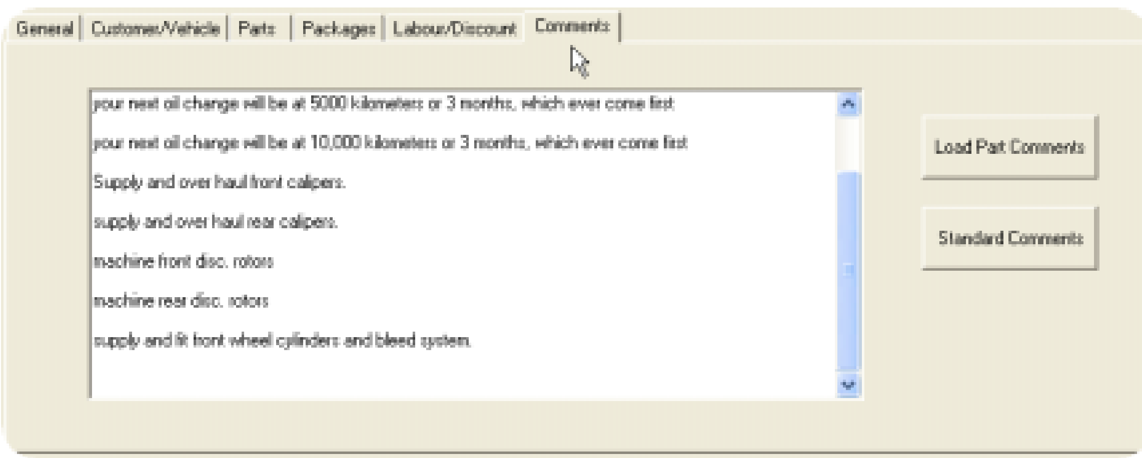


Labour/Discount:

Click on **Labour/Discount**
Click on **mechanic** then choose, click **ok**
Click on **hours** input hours
Click on **minutes** inputs min.
Click on **labour** if you wish to change labour rate – tab through
Click on M**argin** to confirm correct **Margin,** if margin is not enough, then click on **labour** and change the amount or click on discount to discount, bottom left corner
To discount click in target value, type in amount desired
Click ok

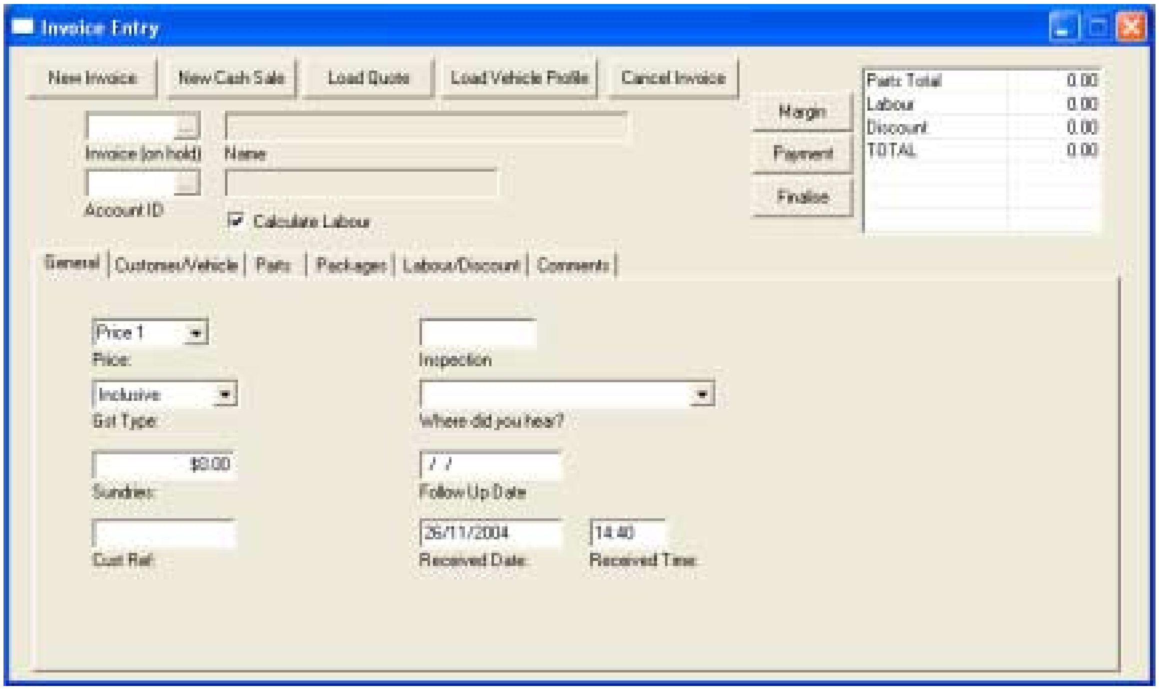
Raise a Quote: (cont'd)

Comments:



Comments:
Click on **comments**
Click on **standard comments (**scroll to comment you want**)**
Click on comment you want
Click ok
Click on Finalise quote:
Exit back to main screen of Muffmansp

Raise an Invoice from a Quote:



Click on **everyday**
Click on **Customer invoice**
Click on **new invoice**
Click on **load quote**
Click on **Qtem Id** drop down box and scroll to customer
Click on **customer's name**
Click ok
Click on **load quote**
Click **code** and click on and off which job type you want.
Click **ok**

Before finishing invoice:

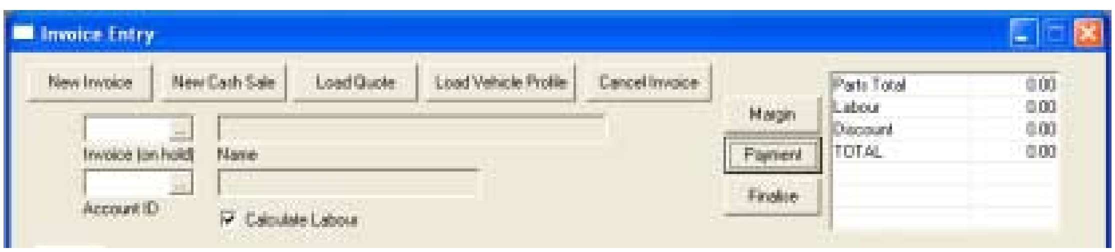
Click on **general, parts, labour/discount, customer /vehicle and** make sure details are ok, **Re-enter comments.**

Raising an Invoice from a Quote: (cont'd)

Margin:

Click on **Margin** again to make sure that **margin** is correct**,** if margin is not enough, then click on **labour** and change the amount.

Payment details:



Click on payment details:

Click on **new**
Click on **arrow icon** and arrow down and choose the payment desired
Click on **ok**
Click on **close**
Click on **Finalize payment**
Click **yes** to comment
Click **ok** to print

Exit back to main Muffman screen

<u>Raise an invoice</u> "without a quote":

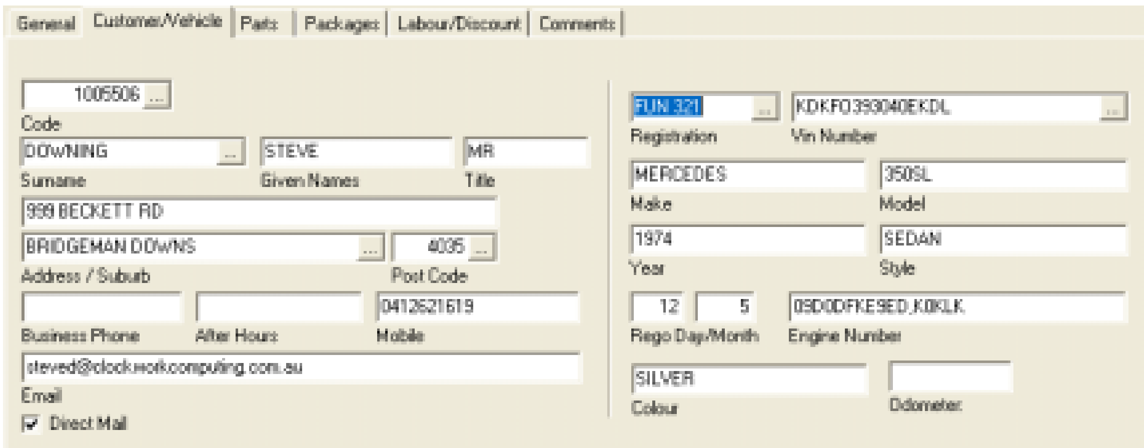
Or

<u>Raise an Account Customer</u> Invoice

Click on **Everyday**
Click on **customer invoice**
Click on **New invoice** or "**New Cash Sale" if you want a cash sale only** (this will take you straight to **parts.)**
Click on **<u>Invoice on hold</u>** or **<u>account ID, drop down box</u>** If you know it's on hold or there an account customer otherwise start **New Invoice**

Raise an invoice “without a quote”: (cont’d)

Customer/Vehicle:



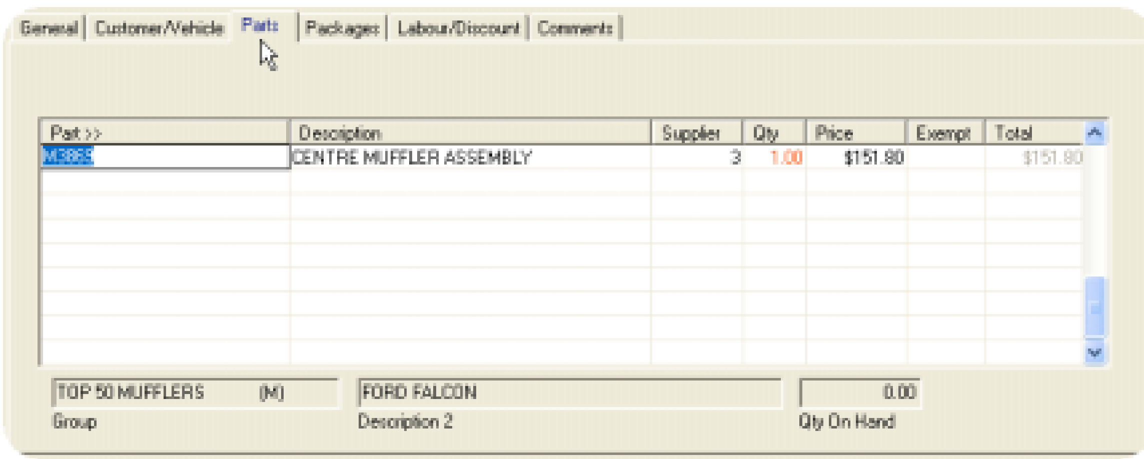
Customer/Vehicle:

Click on **customer/vehicle**

Click on **surname,** enter Surname, then click on drop down box in Surname area, find Surname and OK, if not their cancel and tab through to suburb. After entering suburb click on drop down box to retrieve post code, tab through to finish Customer details.
Click on registration, type in Rego. then click on drop down box in Rego. area, find Rego. and OK, if not their cancel and tab through to finish.

Raise an invoice "without a quote": (cont'd)

Parts:

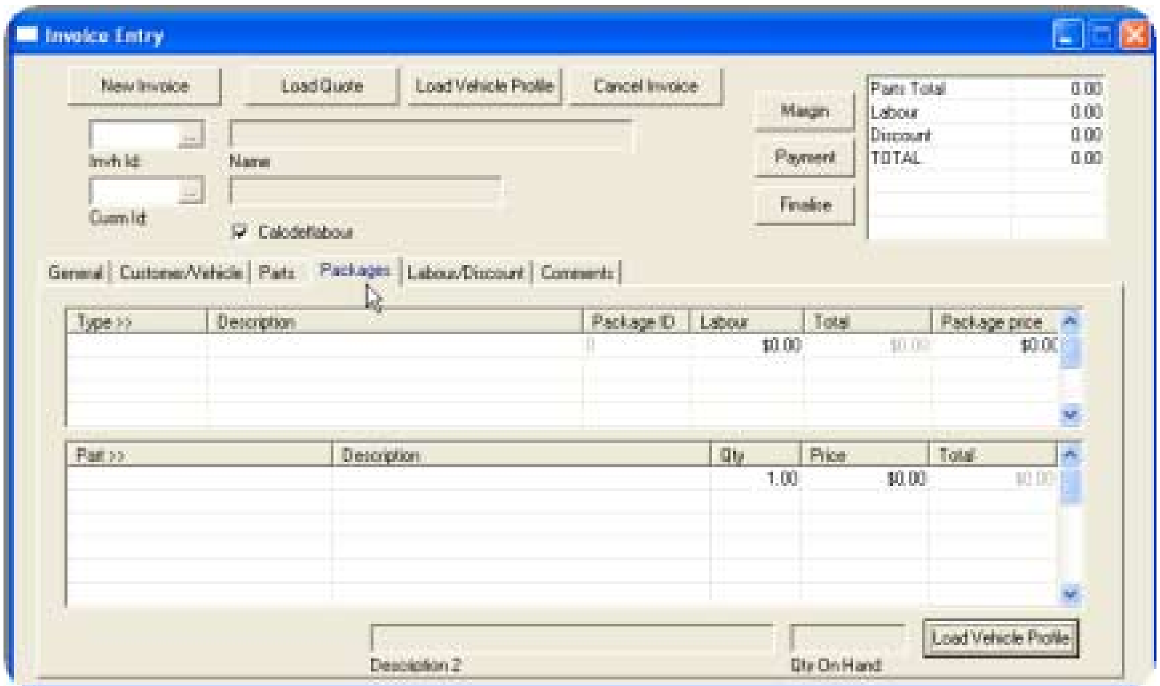


Parts:
Click on line under **parts>>** – type in parts if you know the part number
"Double click on part No. to delete if wrong No. USE THE SHIFT F2 TO DELETE LINE IF WRONG PART No. USED" or F5 to Clear if invalid No. (not a No. in system)
Click on **load vehicle profile** if needed to retrieve part number
Click on **model**, type in model example falcon, commodore, and magna
Click **OK**
Click on **year** and scroll for right year
Click on **catalog type**, type in - example (brakes) or scroll up or down
Click **add**
Click which brake parts you need – If other parts needed like exhaust, go back to **catalog type** and click standard exhaust then click add again.
When finished **click ok.**

Packages

How to use Packages:

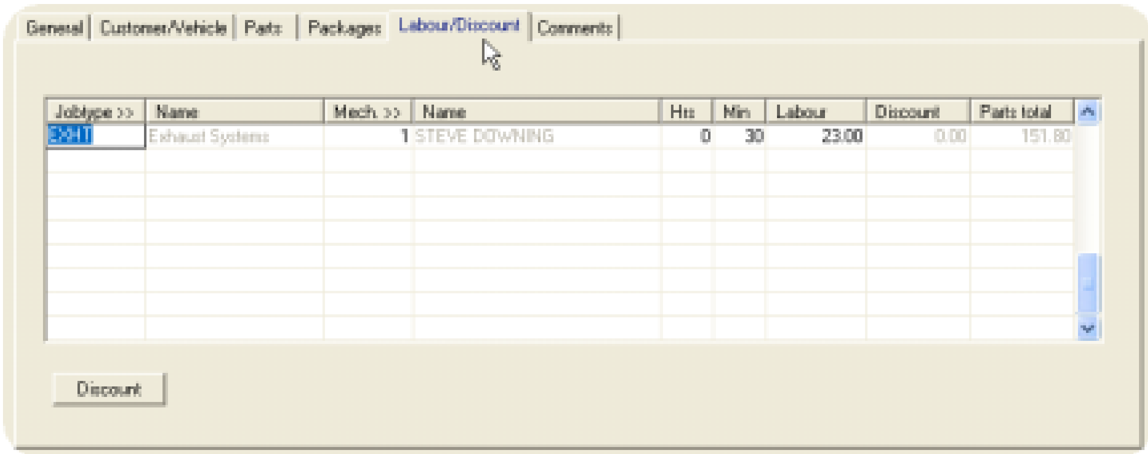
If you want to input a Package, example $79 oil change or $99 brake reline, click on Packages.



Click on Package
Click on type >>
Arrow up or down to pick package
Click on package
Click ok
Click below on part >> or Load Vehicle Profile bottom right "only"
Add parts that are need – tab across
Click ok
Continue on with Labour / Discount

Raise an invoice “without a quote”: (cont’d)

Labour/Discount:



Labour/Discount:

Click on **Labour/Discount**
Click on **mechanic** then choose, click **ok**
Click on **hours** input hours
Click on **minutes** inputs min.
Click on **labour** if you wish to change labour rate.

Margin:

Click on M**argin** to confirm correct **Margin,** if margin is not enough, then click on **labour** and change the amount.

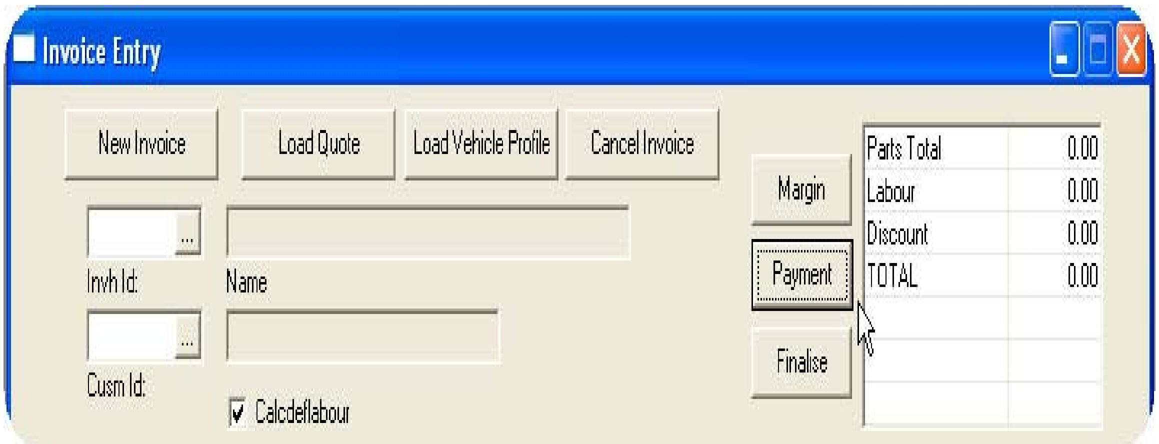
Raise an invoice “without a quote”: (cont’d)

Comments:

Comments:
Click on **comments**
Click on **standard comments (**scroll to comment you want**)**
Click on comment you want
Click ok

Raise an invoice “without a quote”: (cont’d)

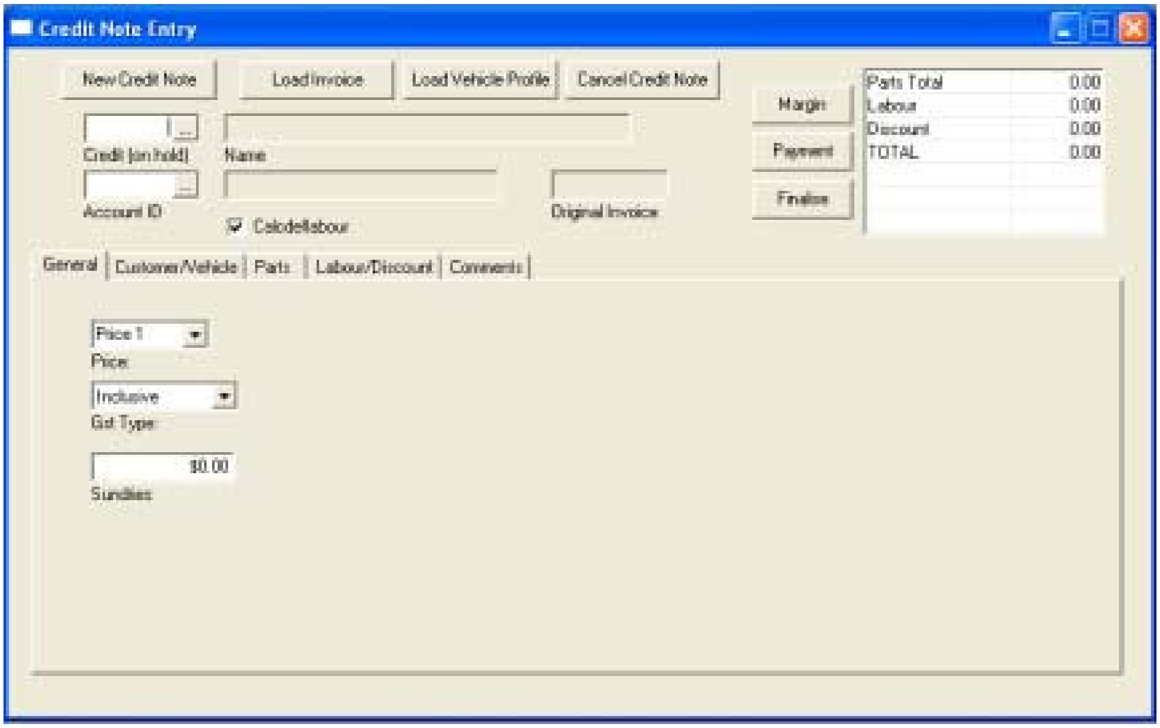
Payment details:



Click on payment details:

Click on **new**
Click on **arrow icon** and arrow down and choose the payment desired
Click on **ok**
Click on **close**
Click on **Finalize payment**
Click **yes** to comment
Click **ok** to print
Exit back to main Muffman screen

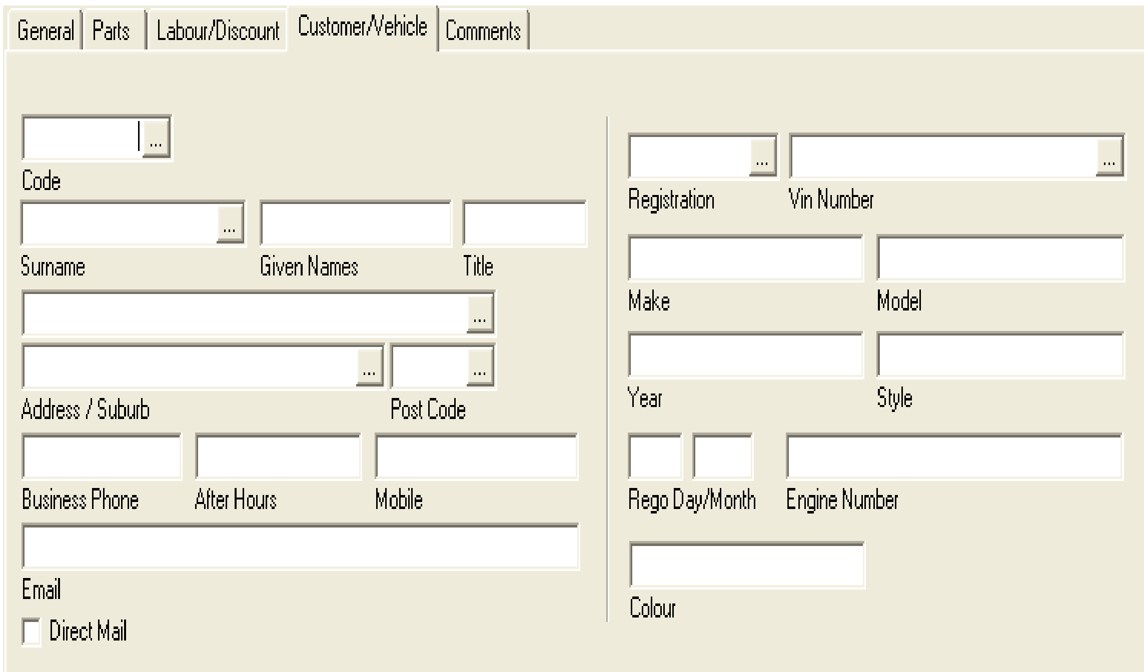
Raise a Customer credit note:



Customer Credit Note:
Click on **Everyday**
Click on **customer credit**
Click on **credit (on hold)** drop down box if you know it's on hold, otherwise
Click on **new credit note**
Click on **Account Id** drop down box if you want an account customer
Click on **Load invoice**
Click on Load invoice drop down box and scroll up or down for invoice to credit or type in invoice # then ok.
Click OK again
Click load invoice

Raise a Customer credit note: (cont'd)

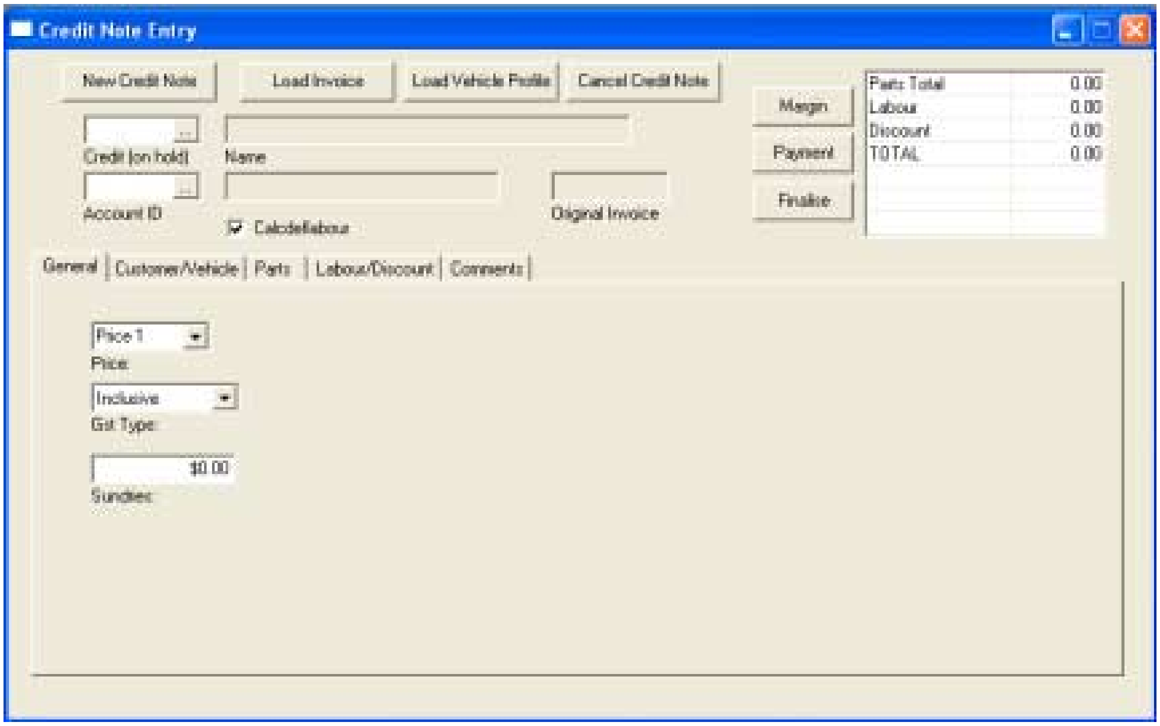
Customer/Vehicle:



Customer/Vehicle:
Click on **customer/vehicle,** if you have chosen an invoice details will appear. IF not
Click on **surname,** enter customer's details and vehicle details by using the tab key. Follow procedure as if you were doing an invoice.

Raise a Customer credit note: (cont'd)

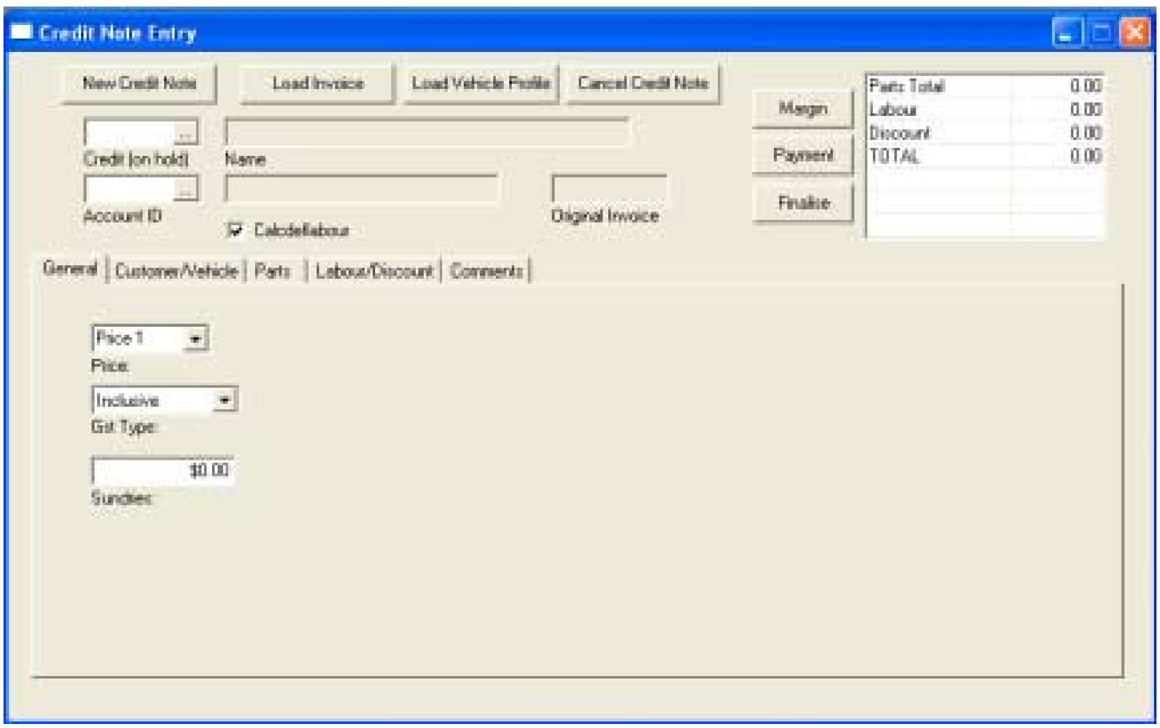
Parts:



Parts:
Click on line under **parts>>** – type in parts if you know the part number
"Double click on part No. to delete if wrong No. USE THE SHIFT F2 TO DELETE LINE IF WRONG PART No. USED" or F5 to Clear if invalid No. (Not a No. in system)
Click on **load vehicle profile** if needed to retrieve part number
Click on **model**, type in model example falcon, commodore, and magna
Click **OK**
Click on **year** and scroll for right year
Click on **catalog type**, type in **-** example (brakes) or scroll up or down
Click **add**
Click which brake parts you need – If other parts needed like exhaust, go back to **catalog type** and click standard exhaust then click add again.
When finished **click ok.**

Raise a Customer credit note: (cont'd)

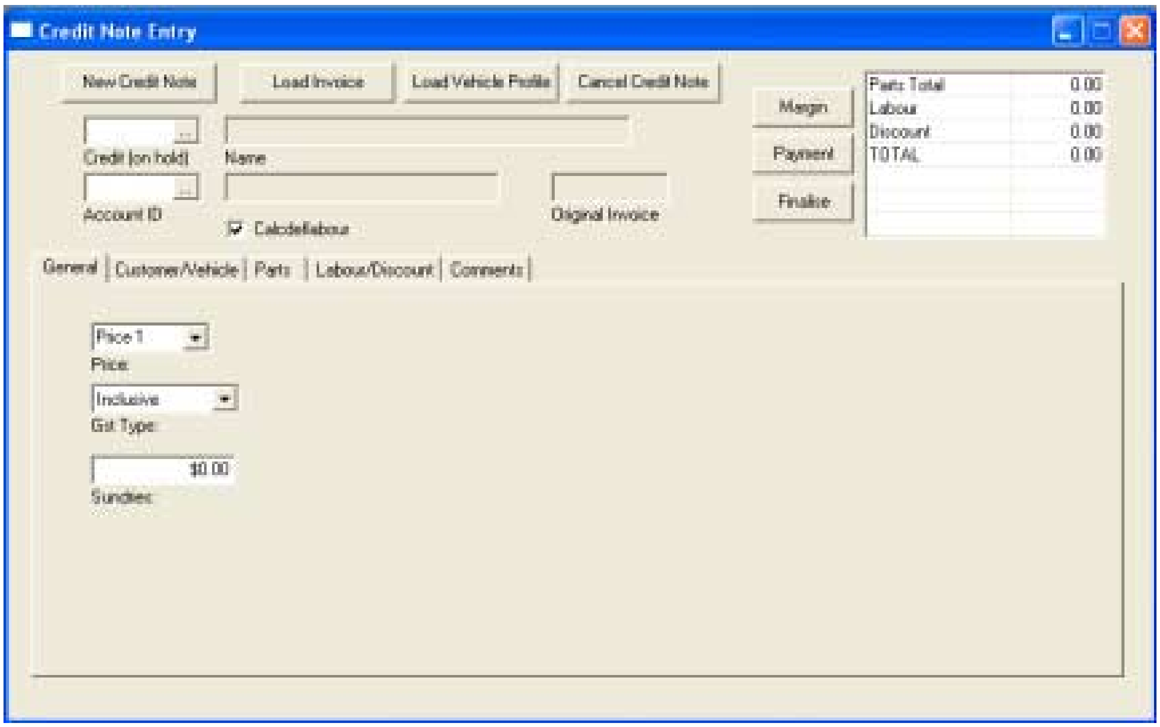
Labour/Discount:



Labour/Discount:
Click on **Labour/Discount**
Click on **mechanic** then choose, click **ok**
Click on **hours** input hours
Click on **minutes** inputs min.
Click on **labour** if you wish to change labour rate then tab through.

Raise a Customer credit note: (cont'd)

Comments:

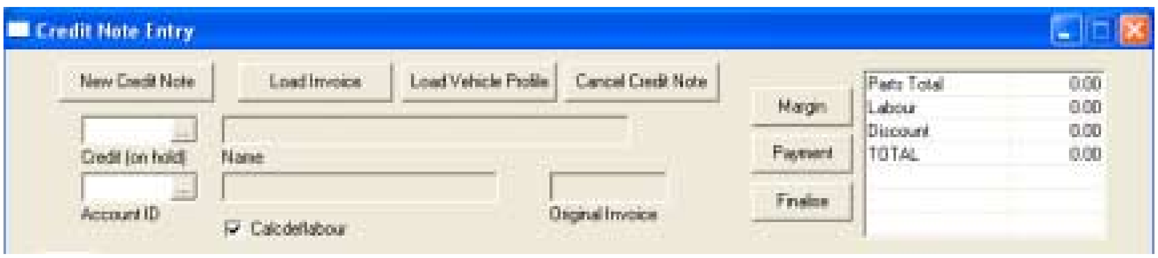


Comments:

Click on **comments**
Click on **standard comments (**scroll to comment you want**)**
Click on comment you want or add your own
Click ok
Finishing Customer Credit note:
Click on **general, parts, labour/discount, customer/vehicle and comments** to make sure details are ok.

Raise a Customer credit note: (cont’d)

Payment details:



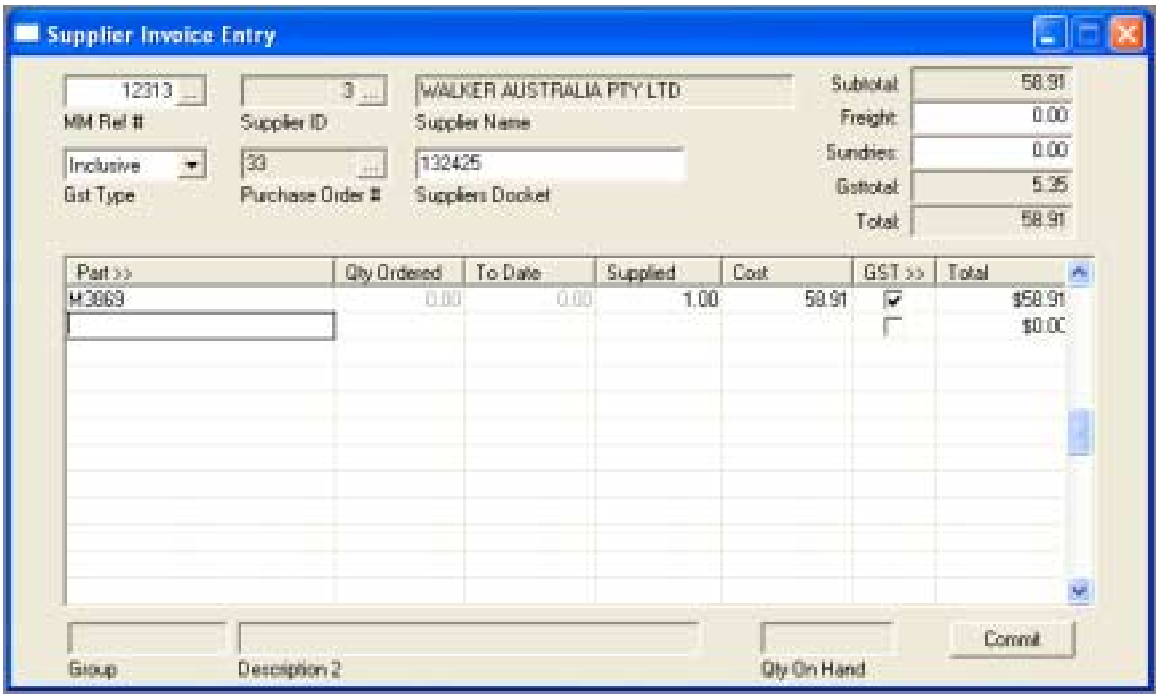
Click on Payment details:

Click on **new**
Click on **arrow icon** and arrow down and choose the payment desired
Click on **ok**
Click on **close**

Click on **Finalize payment**
Click **yes** to comment
Click **ok** to print

Exit back to main Muffman screen

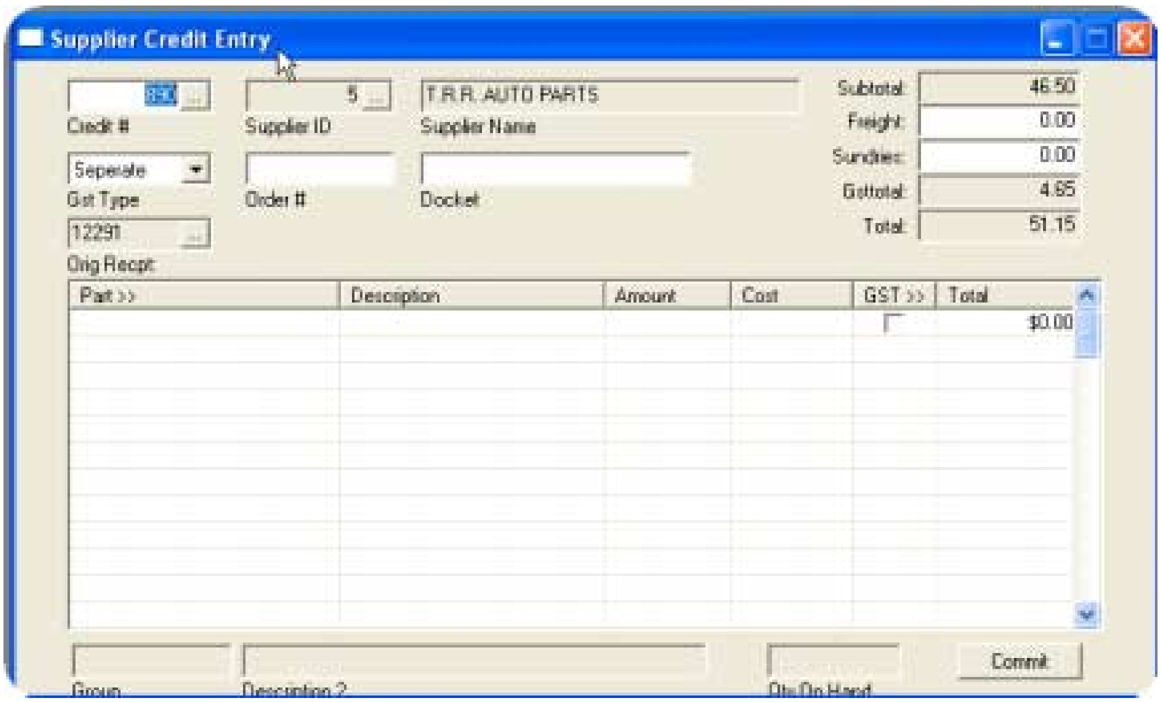
ENTERING A SUPPLIERS INVOICE



Click on Everyday
Click on Suppliers invoice
Click on suppliers drop down box
Scroll up or down to choose supplier
Click on supplier then click ok
Click in purchase order # then type in #
Click in supplier docket #
Click in freight then sundries if you need to add amounts in.
Click in part and add parts tab through
Make sure totals are correct and commit.

Raise a Suppliers credit entry:

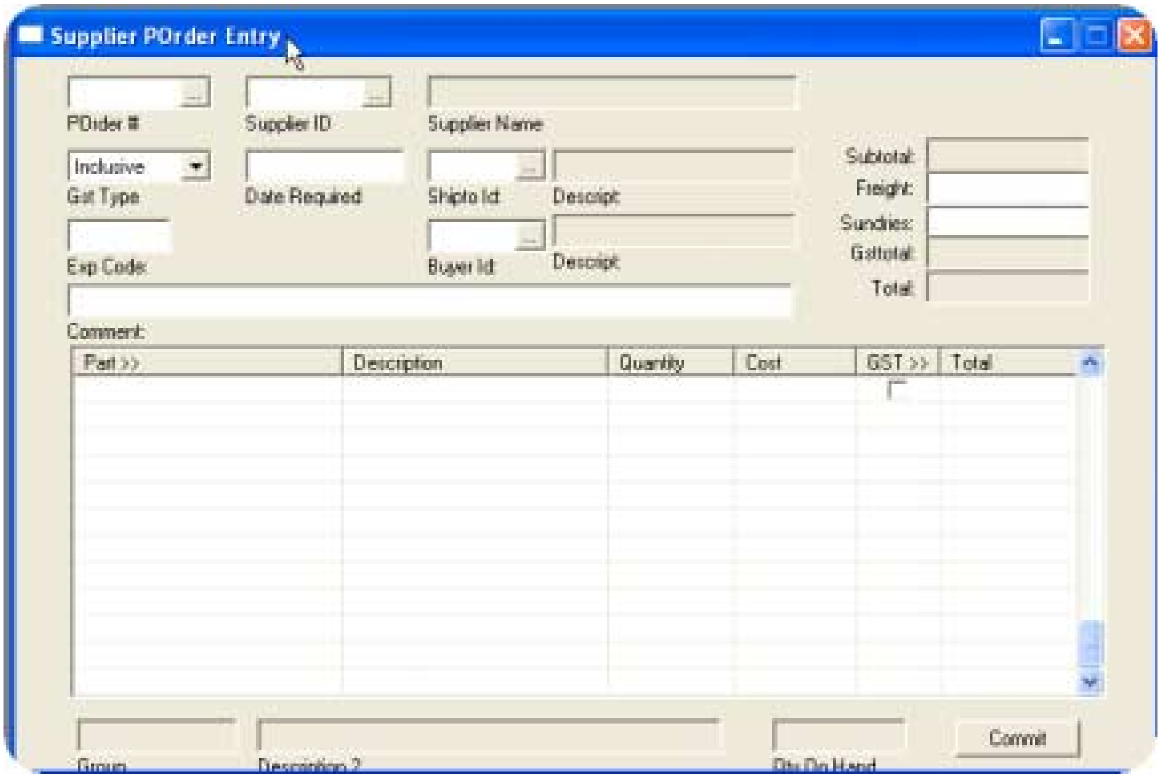
Supplier Credit entry:



Supplier Credit entry:

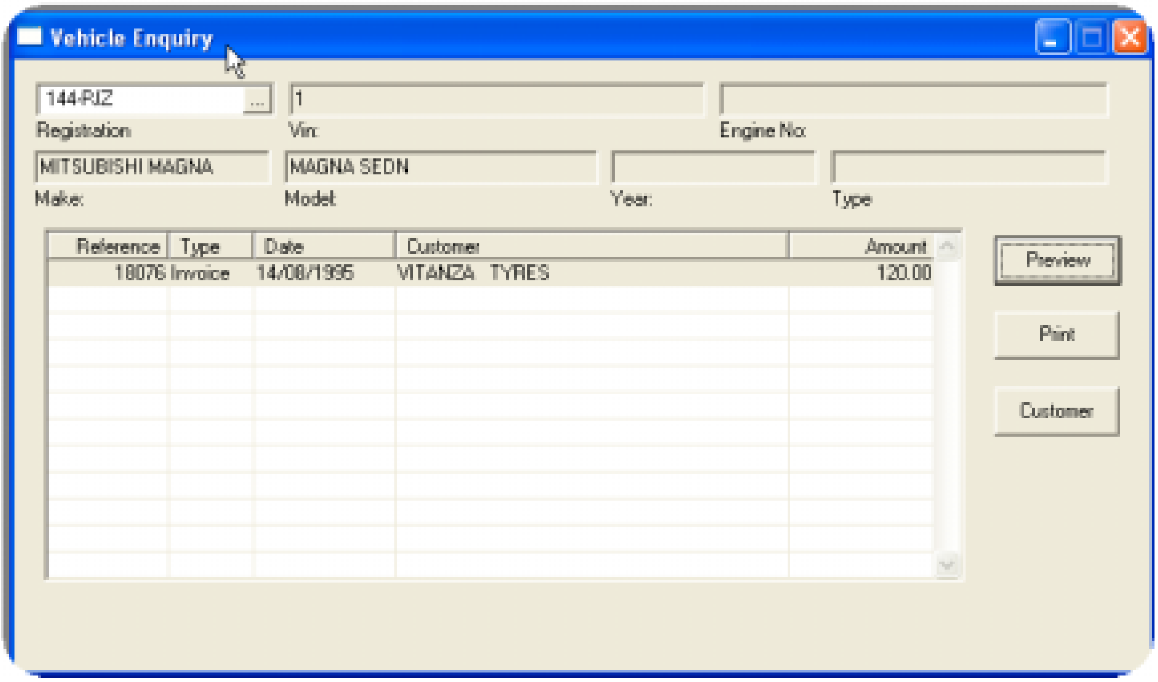
Click on **Everyday**
Click on **supplier credit**
Click on **supplier Id**
Click on supplier and ok…tab through and enter details tab to orig Recpt:
click on drop down box choose in voice and ok
Tab to **freight and sundries** enter amount if any
Tab to **Parts** –add or delete part #, tab all the way through to next line
Click on **commit**
Click on yes to commit

Raise a Suppliers Purchase Order



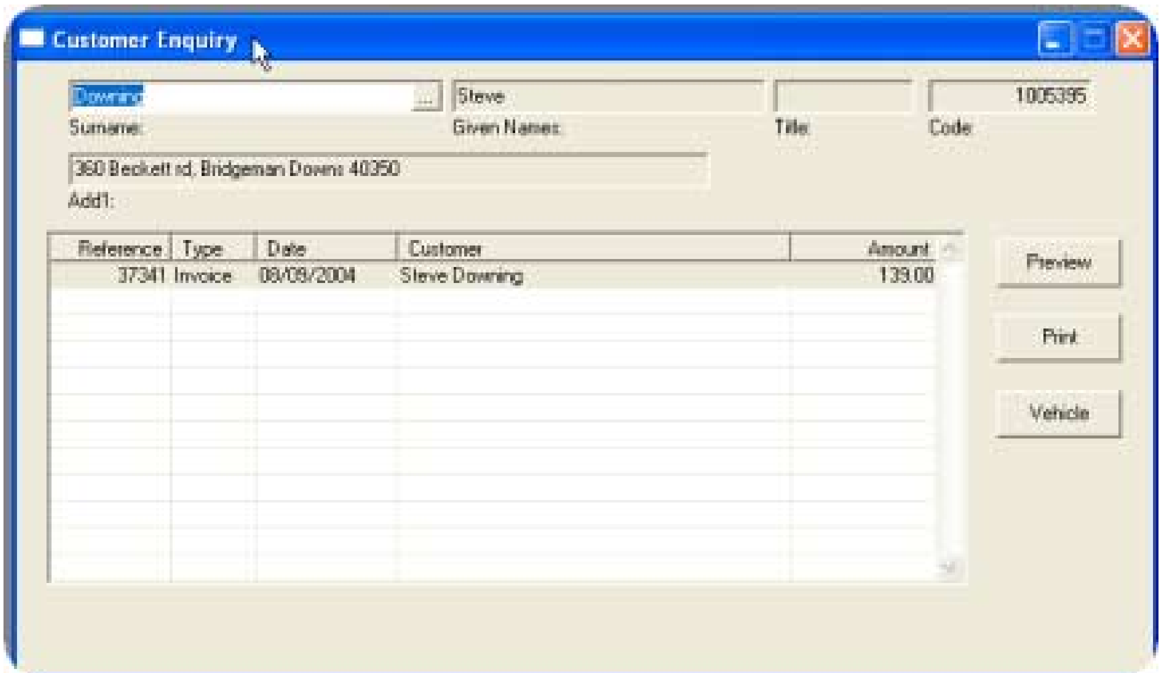
Click on everyday
Click on suppliers purchase order
Type in purchase order number
Click on supplier Id
Click on supplier you want
Click OK
Click on ship to and select destination
Click on buyer Id, select the person you want
Click ok
Click on Parts, type in part #
Click OK
Click OK
Tab all the way across to get to new line
Click on Parts bar and type in a part again
Click OK
Click on commit
Click on yes to commit
Click OK to print

Vehicle Enquiry:



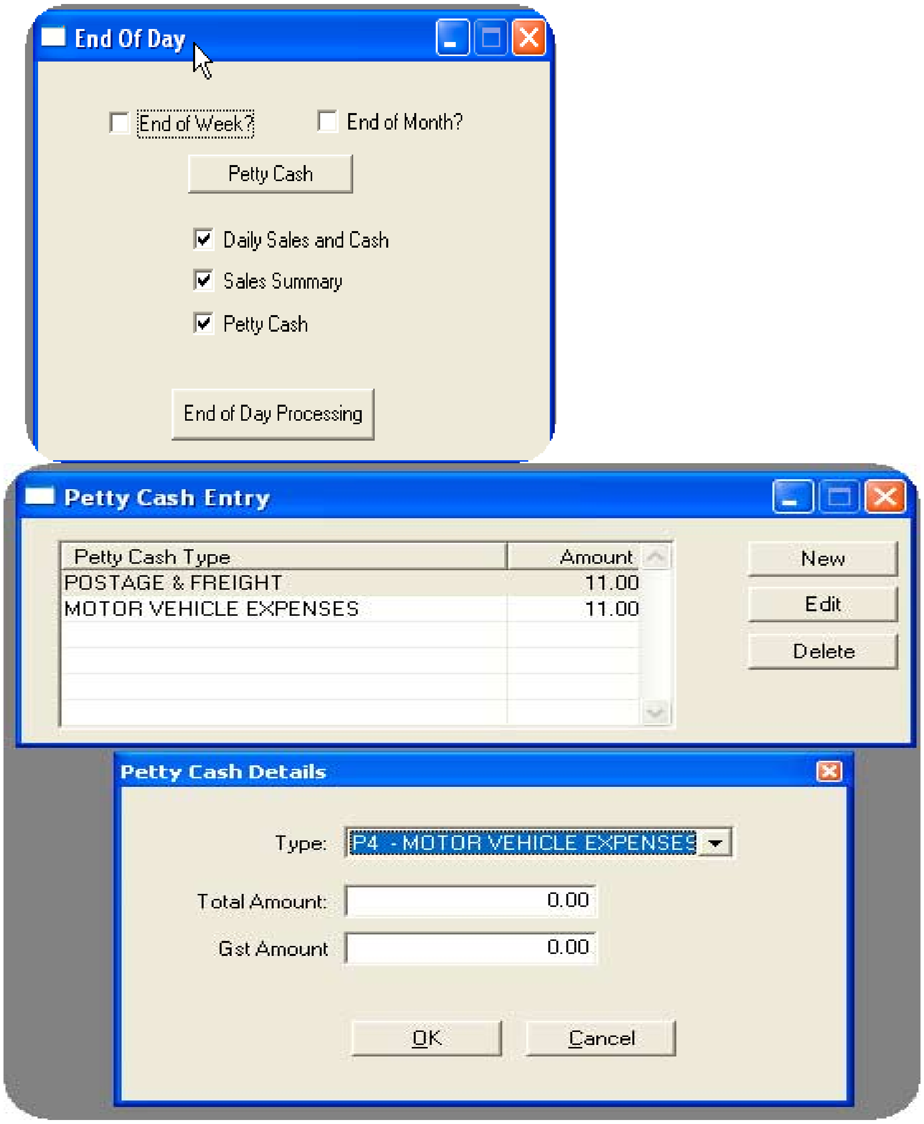
Click on **everyday**
Click on **vehicle enquiry** – type in registration # click on drop down box to see if customer has been in before, details will pop up.
Click OK, Choose invoice or quote
Click on **preview** for details
Click on **whole page** and arrow down to 150% - print if desired
Exit to return main menu

Customer enquiry:



Click on **everyday**
Click on **customer enquiry** – type in customer name, click on drop down box to see if customer has been in before, details will pop up.
Click OK, Choose invoice or quote
Click on **preview** for details
Click on **whole page** and arrow down to 150% - print if desired
Exit to return main menu

End of day procedures:

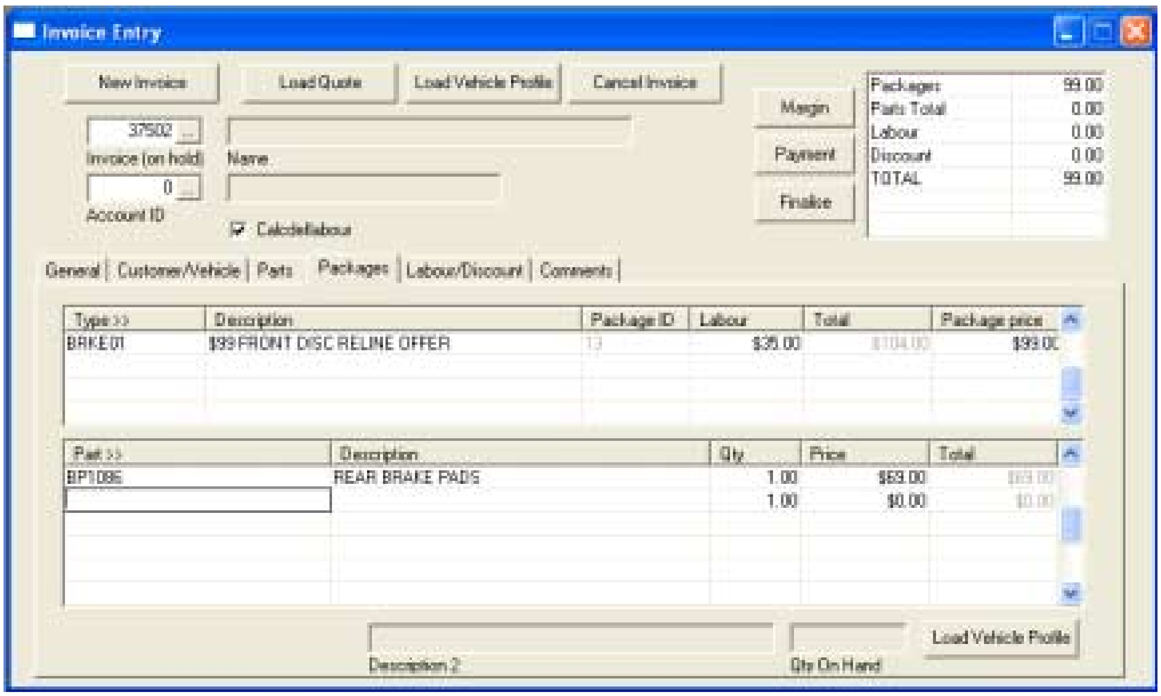


Click on everyday
Click on end of day
Click on end of week or end of month
Click on petty cash
Click on new and arrow down to type of entry you want, type in amount
Click ok, then exit
Click on end of day processing

Packages

How to use Packages:

If you want to input a Package, example $79 oil change or $99 brake reline, click on Packages.

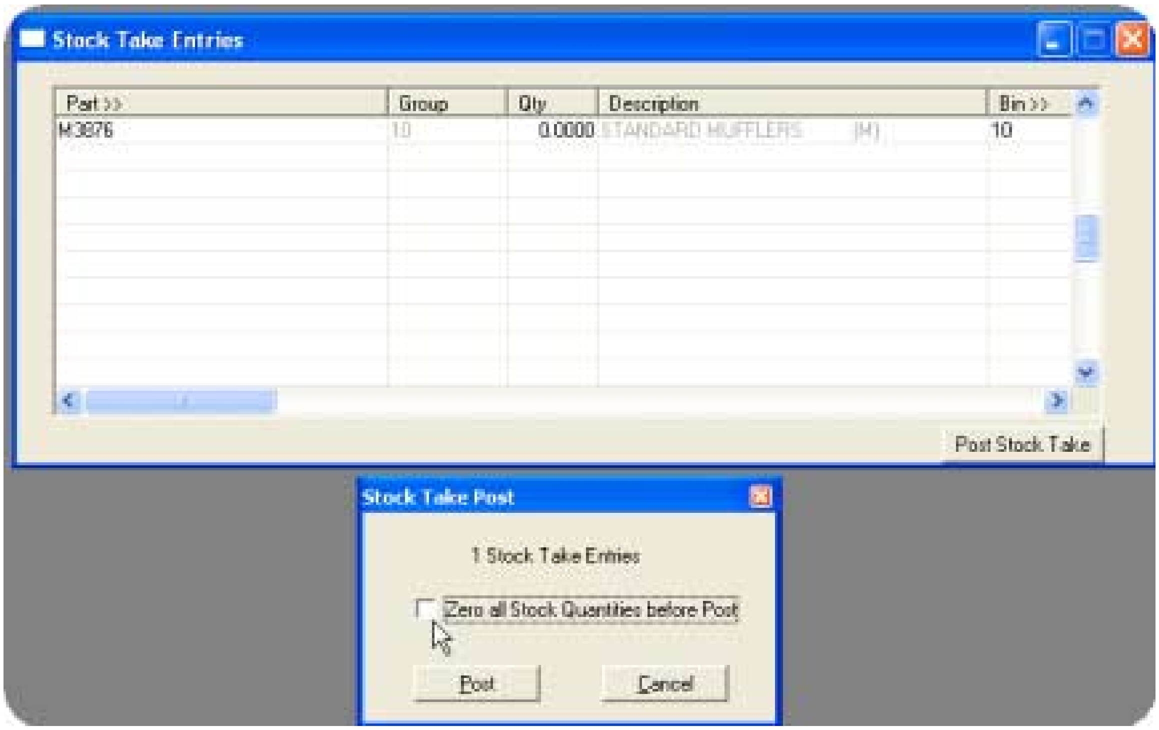


Click on everyday
Click on customer invoice
Click on new invoice then customer/vehicle and enter details
Click on Package
Click on type >>
Arrow up or down to pick package
Click on package
Click ok
Click on part >> or Load Vehicle Profile bottom right “only”
Add parts that are need
Click ok
Continue on with Labour / Discount

MAINTENANCE

Reports & Reprints

STOCK TAKE



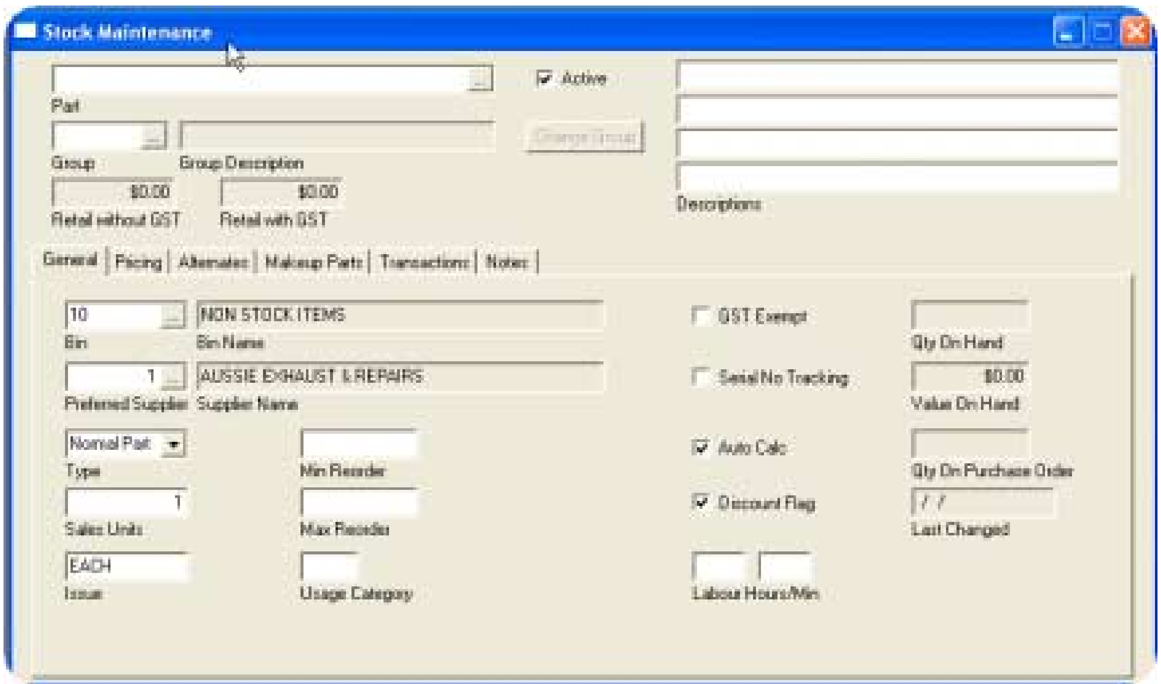
“Read First”

Click on stock
Click on stock take entry
Type in part number, tab across
Click on post stock take
!!!!!!!!!!!! To do a complete stock take enter all parts first !!!!!!!!!
Click zero all stock quantities before posting, this will zero all stock and only post what you have entered

If you only want to change a couple of parts then
Don’t click “Zero all stock quantities before post”

STOCK MAINTENANCE

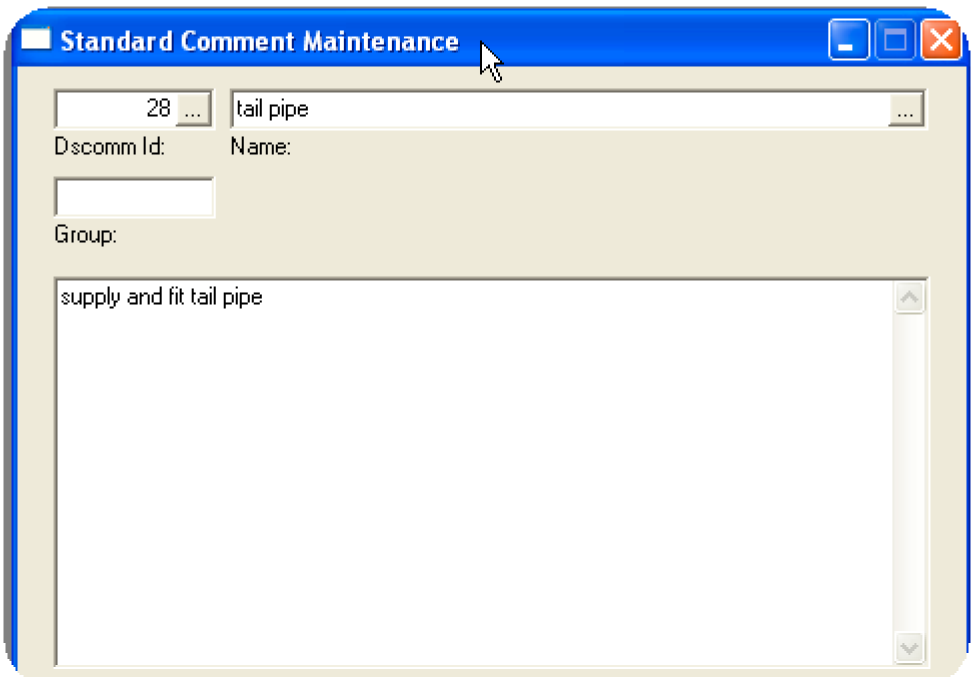
To change part details: example, price, bin location, description



Click on stock
Click on stock maintenance
Type in part number
Hit f9 key, this brings up details
Tab through to make changes

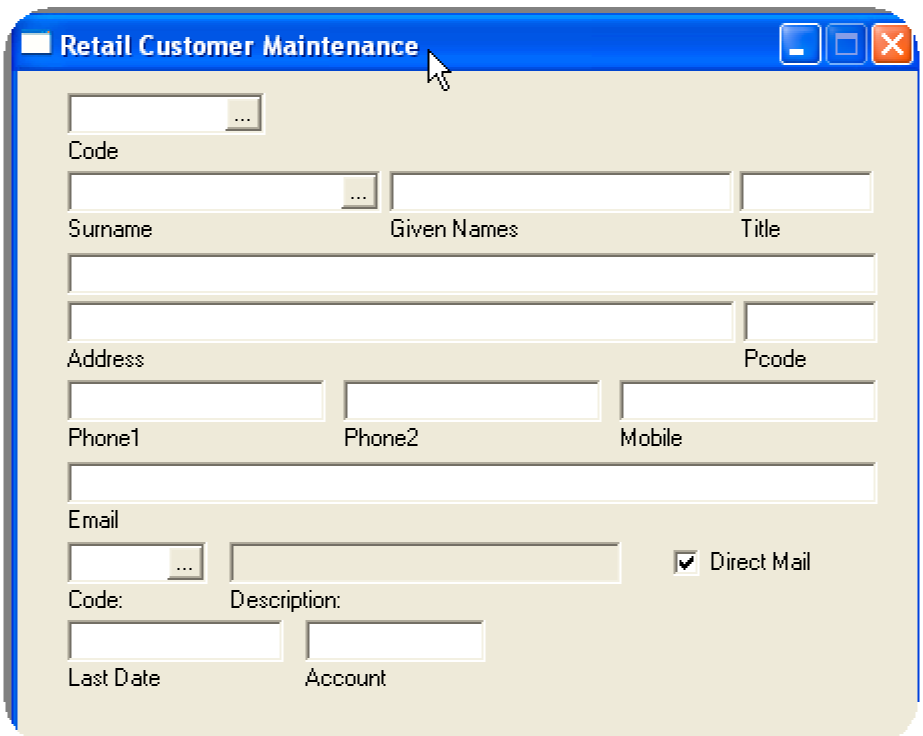
Adding or changing Standard comments

To add your own comment:



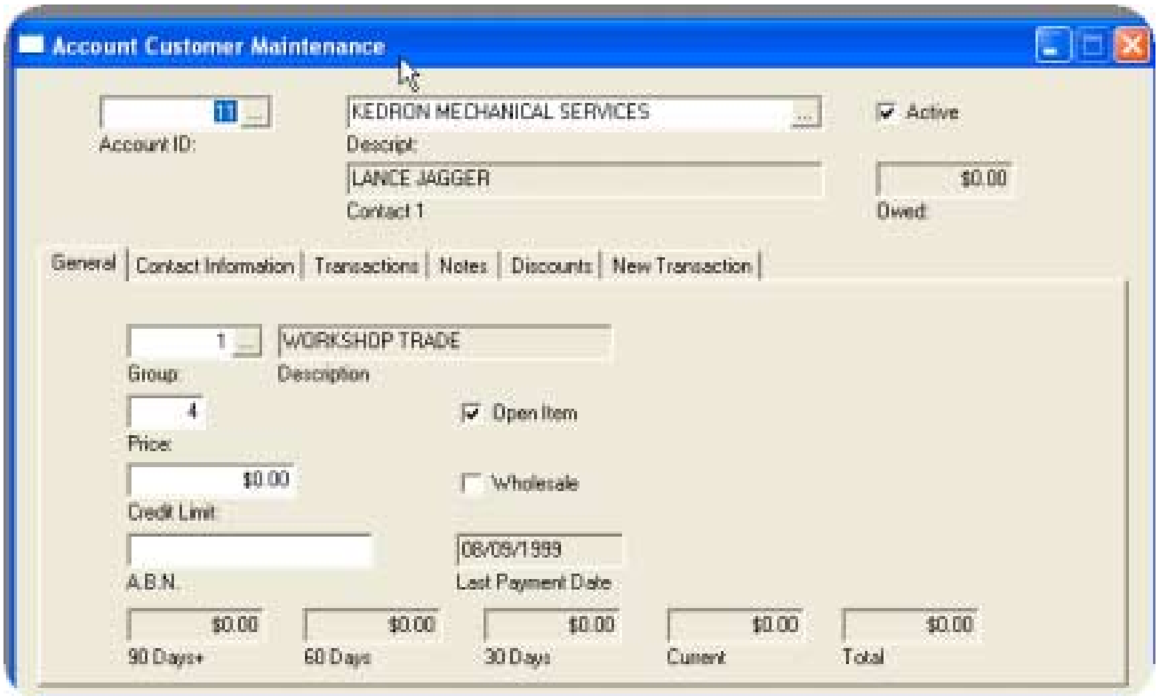
Click on **other, setup** scroll over to **standard comments** and click
Click on **Dscomm Id**: drop down box to change details click ok and delete.
Type in new No. and tab
Type in service, example front brakes, tab to big area don't worry about group.
Type in full description, and then save

To change customers details



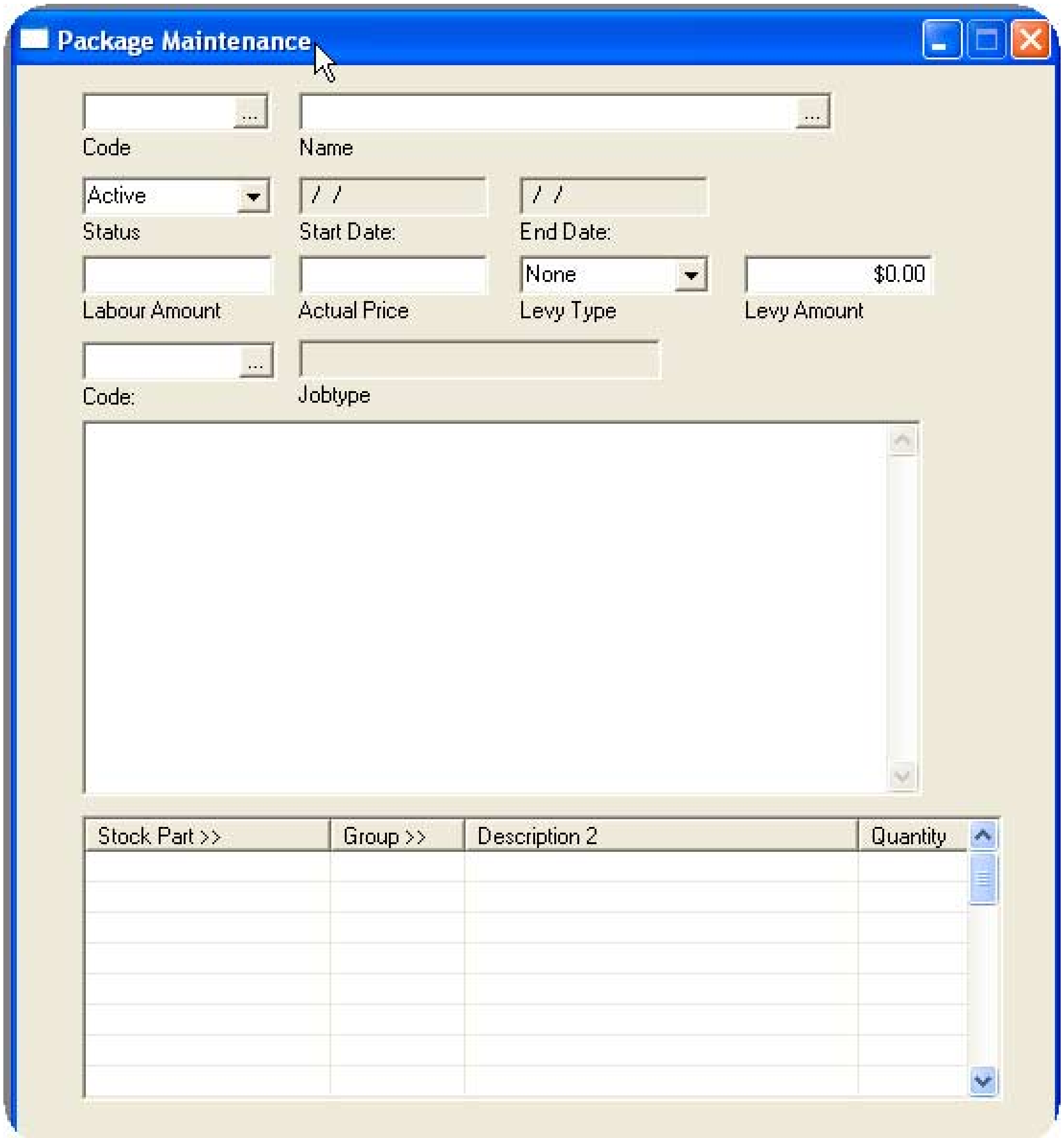
Click on CUSTOMER
Click on retail customer maintenance
Click on code box to drop down customer
Click on surname, type in
Click ok, find customer then ok
Hit tab to make changes, tab to **code:** click on drop down box and choose, click
At end click save, click yes to save

To change Account customers details



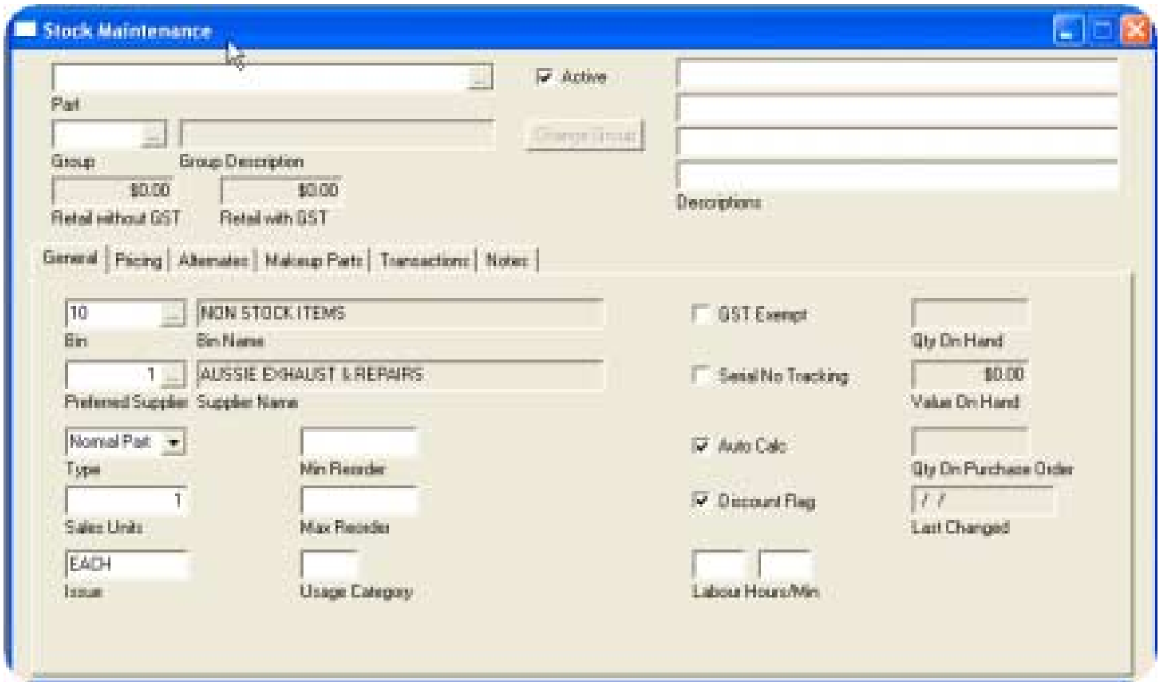
Click on Customer
Click on Account customer maintenance
Click on Account ID box to drop down customer
Click on Account Customers name
Click ok, find customer then ok
Hit tab to make changes
At end click save, click yes to save

Changing Packages



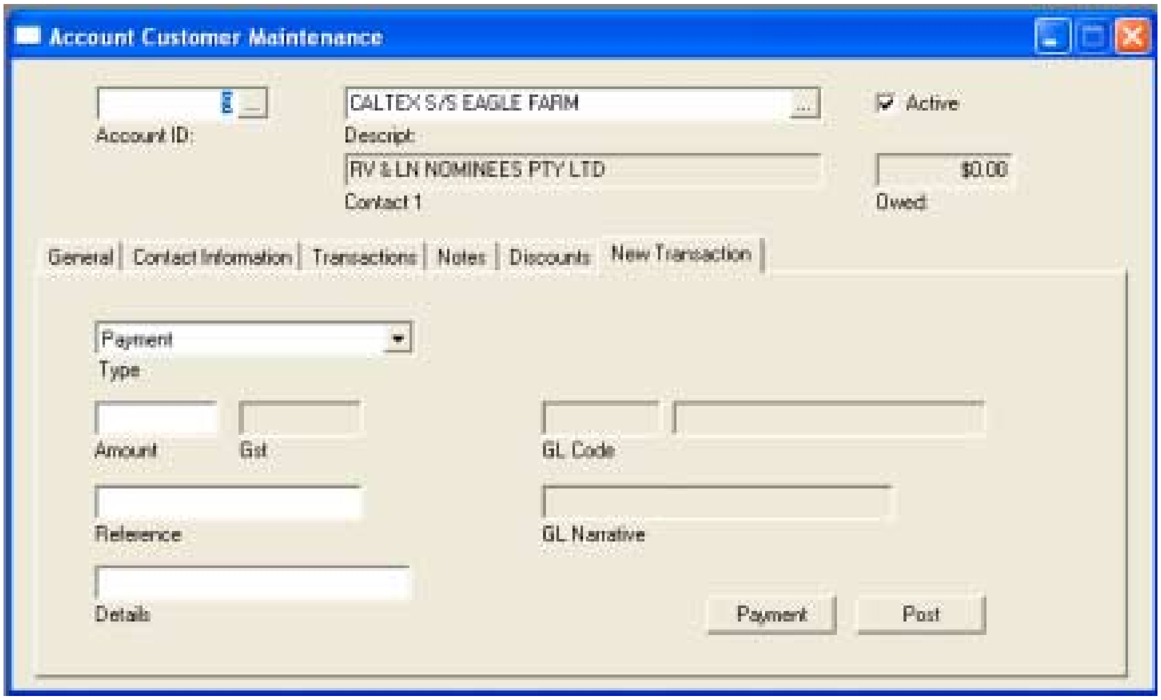
Click on other, maintenance, package maintenance
Click on package maintenance
Click on code
Arrow up or down to choose package
Click ok
Click in different areas to change then save

STOCK MAINTENANCE
"MAKE UP PARTS"



Click on stock
Click on stock maintenance
Clear all if part comes up
To make up a new part
Type in part number and tab, click on drop down and choose group, click OK
Tab all the way through to alternates and then type in costs and retails prices
Exit out to save

Account Customers Payment



Click on Customer
Click on Account customer maintenance
Click on account ID drop down box and choose the acc. Customer you want.
Click ok
Click on transactions write down the Ref # and detail #.
Click on new transaction
Click on **amount** and type in the amount paying
Click on Reference and type in the Ref # you wrote down.
Click on detail, this can be what ever you want, example check #, Rego,
Click on payment
Click on new
Click on drop down box, choose which method of payment
Click ok, Click close, Click post
Either **auto select** or **tick** the invoice you want to pay off
Click OK

Reports “Sales Analysis Report”

Click on others, reports,
Click on sales analysis by job type
Click on today, this week, this month or enter date range you wish to use, example: 01/09/04 to 30/09/04
Click on preview, and then click on print to preview

Sales Analysis by Job Type

From 01/09/2004 to 30/09/2004

All values are exclusive of GST

Store: 0001 Clockwork Computing Test Site

34 Invoices, No Credit Notes

	Exhaust Systems		Braking Systems		Shocks & Springs		Oil Change		Maintenance Services	
Number Of Jobs	23 $	%	11 $	%	0 $	%	3 $	%	33 $	%
Part Sales	3588.36	81.9	848.40	45.5	0.00	0.0	0.00	0.0	438.56	55.1
Labour	794.00	18.1	817.00	43.8	0.00	0.0	0.00	0.0	357.00	44.9
Service Charges	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0
Packages	0.00	0.0	198.00	10.6	0.00	0.0	209.85	100.0	0.00	0.0
Total	4382.36		1863.40		0.00		209.85		795.56	
Discount On Retail	-783.08	-17.8	-10.00	-0.4	0.00	0.0	0.00	0.0	-0.95	0.0
Gross Revenue	3599.28		1853.40		0.00		209.85		794.61	
Cost of Goods	1263.77	35.1	246.52	13.3	0.00	0.0	0.00	0.0	215.11	27.1
Gross Profit	2335.51	64.9	1606.88	86.7	0.00	0.0	209.85	100.0	579.50	72.9

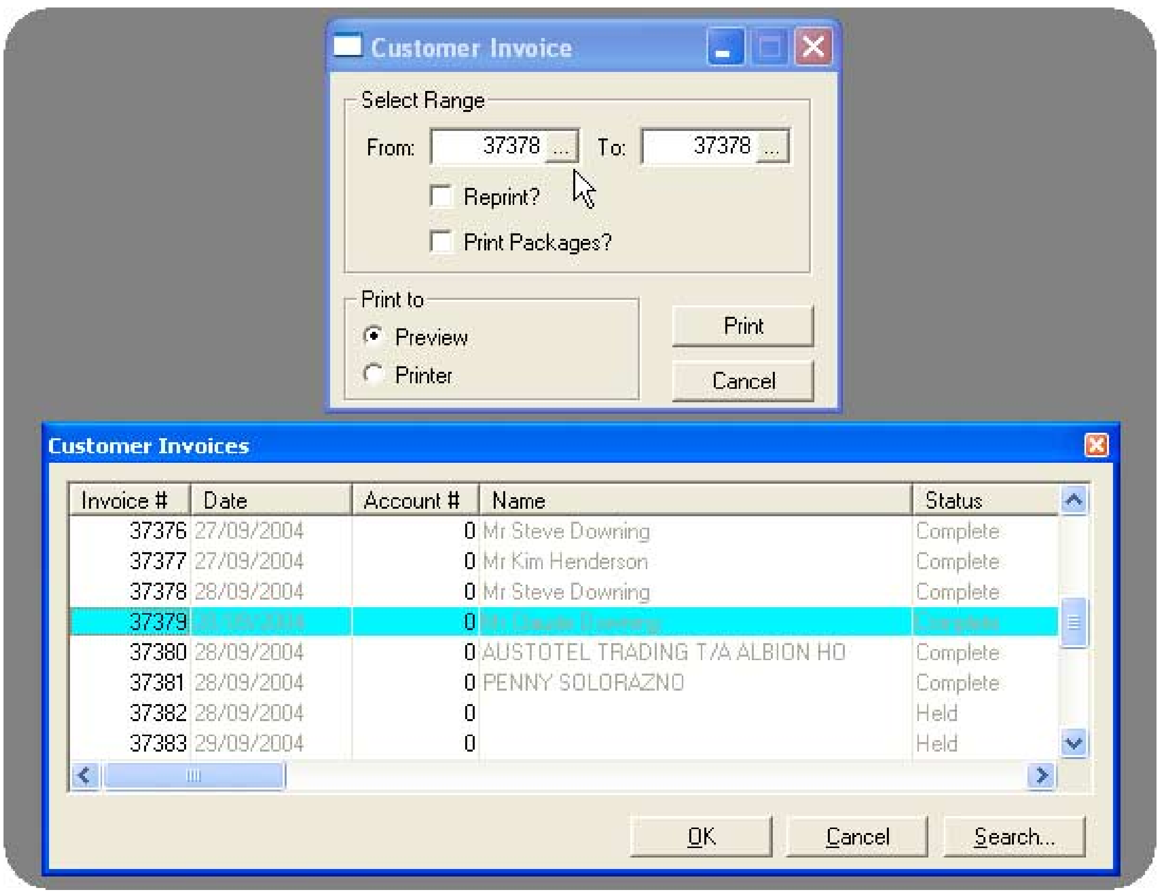
	Alignment & Steering		Drivetrain & Clutch		Cooling Systems		OTHER		TOTAL	
Number Of Jobs	0 $	%	0 $	%	0 $	%	0 $	%	70 $	%
Part Sales	0.00	0.0	0.00	0.0	0.00	0.0	40.00	100.0	4915.32	67.4
Labour	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1968.00	27.0
Service Charges	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0
Packages	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	407.85	5.6
Total	0.00		0.00		0.00		40.00		7291.17	
Discount On Retail	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	-794.03	-10.8
Gross Revenue	0.00		0.00		0.00		40.00		6497.14	
Cost of Goods	0.00	0.0	0.00	0.0	0.00	0.0	6.74	16.9	1732.14	26.7
Gross Profit	0.00	0.0	0.00	0.0	0.00	0.0	33.26	83.2	4765.00	73.3

Total Rounding:	-0.02
Total GST:	645.41
Gross Revenue (with GST):	7142.53

Reprint

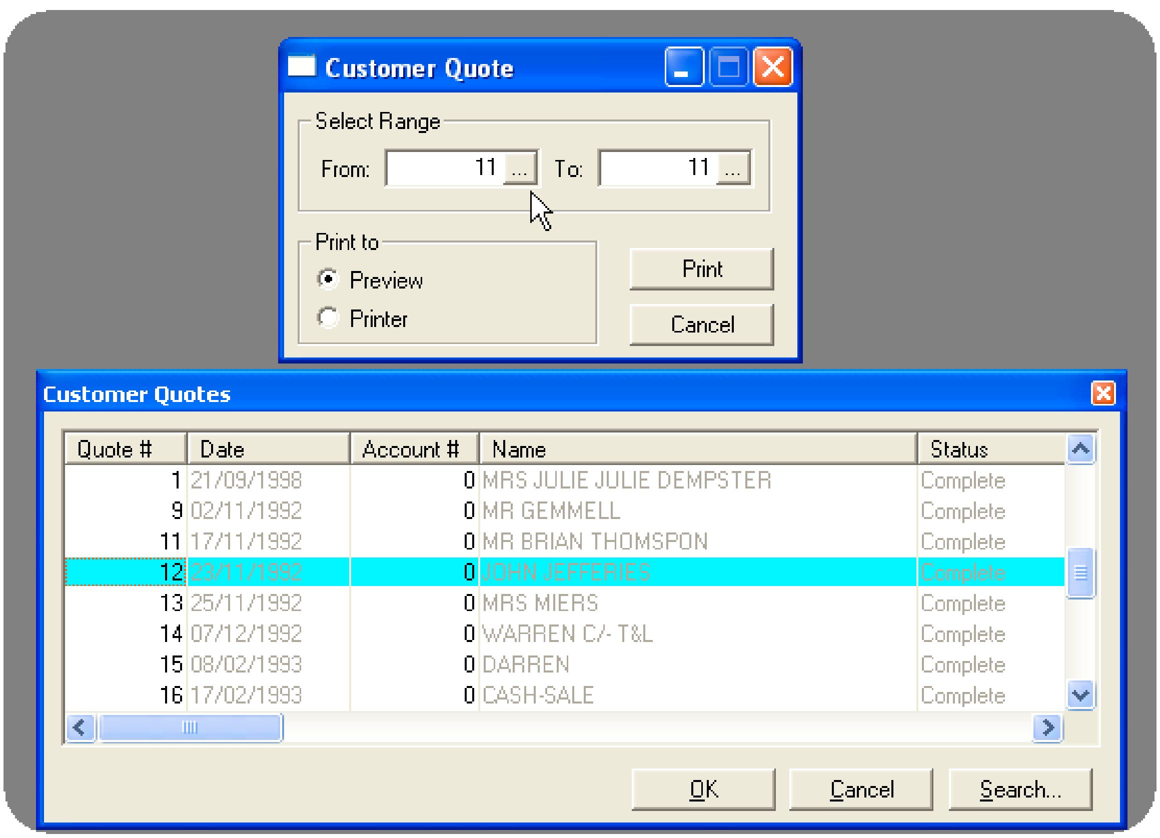
Customers Invoice

Click on customer
Click on reprint invoice
Click on tab box in from: arrow up or down to date or invoice
Click on to and type in invoice number
Click on ok
Click on preview and print
Click on print to print

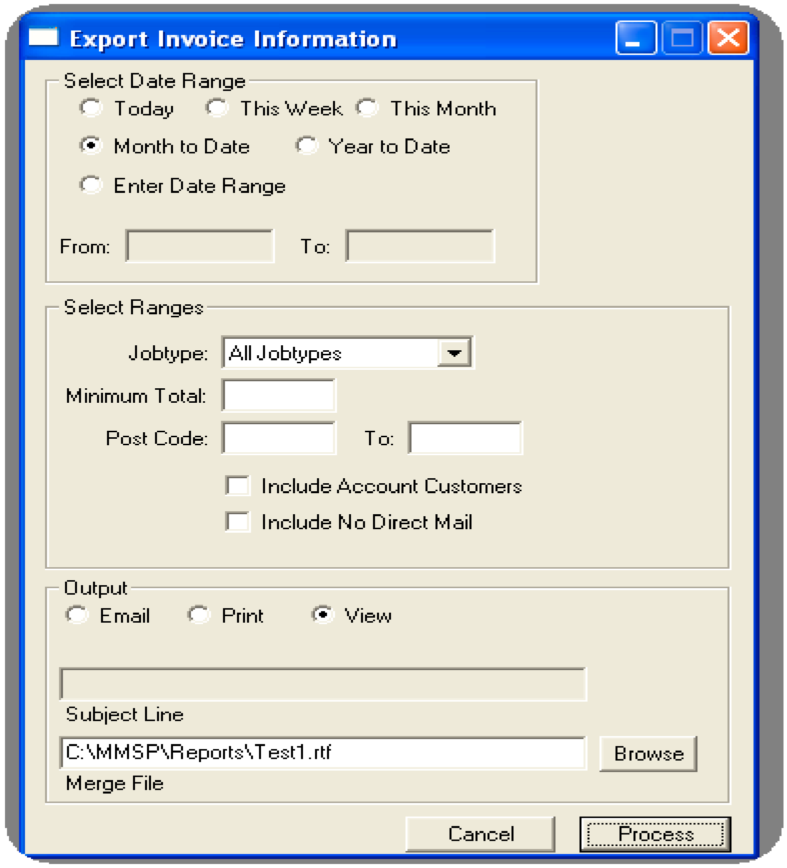


Reprint
Customer Quote

Click on customer
Click on reprint Quote
Click on tab box in from: arrow up or down to date or invoice
Click on to and type in invoice number
Click on ok
Click on preview and print
Click on print to print

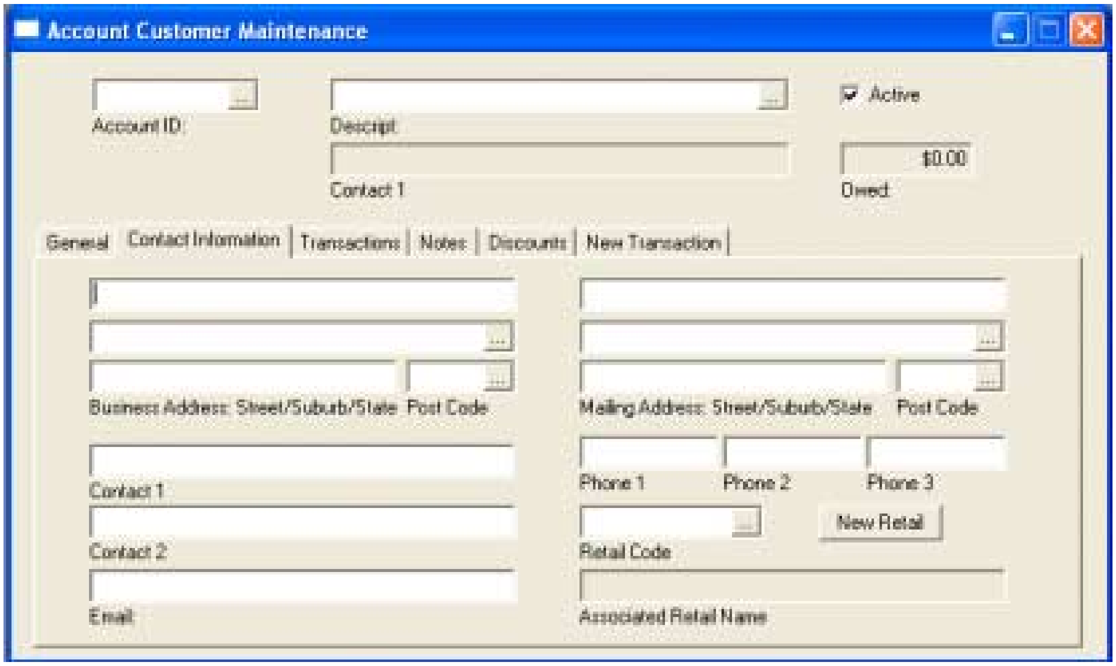


CREATE CUSTOMER LETTERS



Click on customer
Click on create customer letters
<u>Select date range:</u>
Select Job type: example all job type, oil change or braking system
<u>Minimum Total:</u> leave blank or you can put in an amount if you want only customers that spend over that amount to receive letters or e-mail.
<u>Post code:</u> leave blank unless you have a curtain postal area you're targeting.
<u>Include account customer:</u> only tick if you want to include them in your mail out.
<u>Include no direct mail:</u> leave blank (only for recall purposes)
<u>Output:</u> if you click e-mail it will go direct to the customer via e-mail
<u>Print:</u> will print and **<u>view:</u>** will let you view (suggest you view all first)
Click on **<u>Browse:</u>** to choose letter you want, click **<u>Process:</u>** when ready to send e-mail or letters

Adding new Account Customers



Click on customer
Click on Account customer maintenance
Click in Descript: type in new Acc.customers name
Tab through to Group click on drop down box and choose which one you want then click OK
Tab through to Contact Information, then tab through and add details.
When you get to the **New Retail Button** make sure you click on this, then exit and click on yes to save