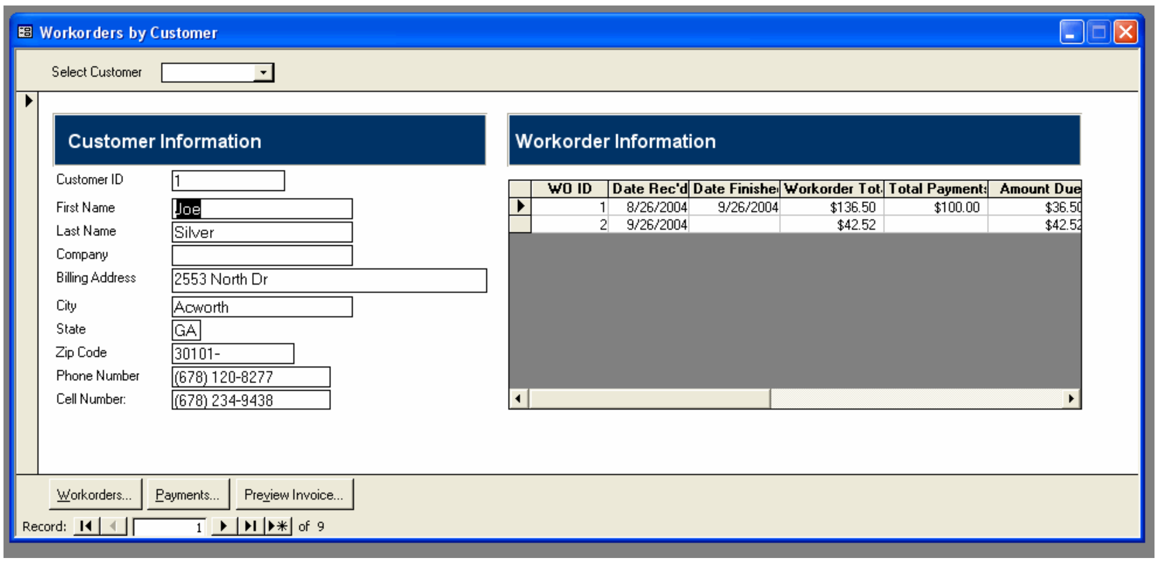
<u>ShopTrack User Guide</u>

Enter Company Information – This is done through **Enter/View Other Information** in the main panel. From there choose **Enter/View My Company Information.**

- Enter your shop address and phone number. This will generate your letterhead on the invoices and forms.
- Enter your tax rate. This sets the tax rate for parts and labor for your workorders and reports.

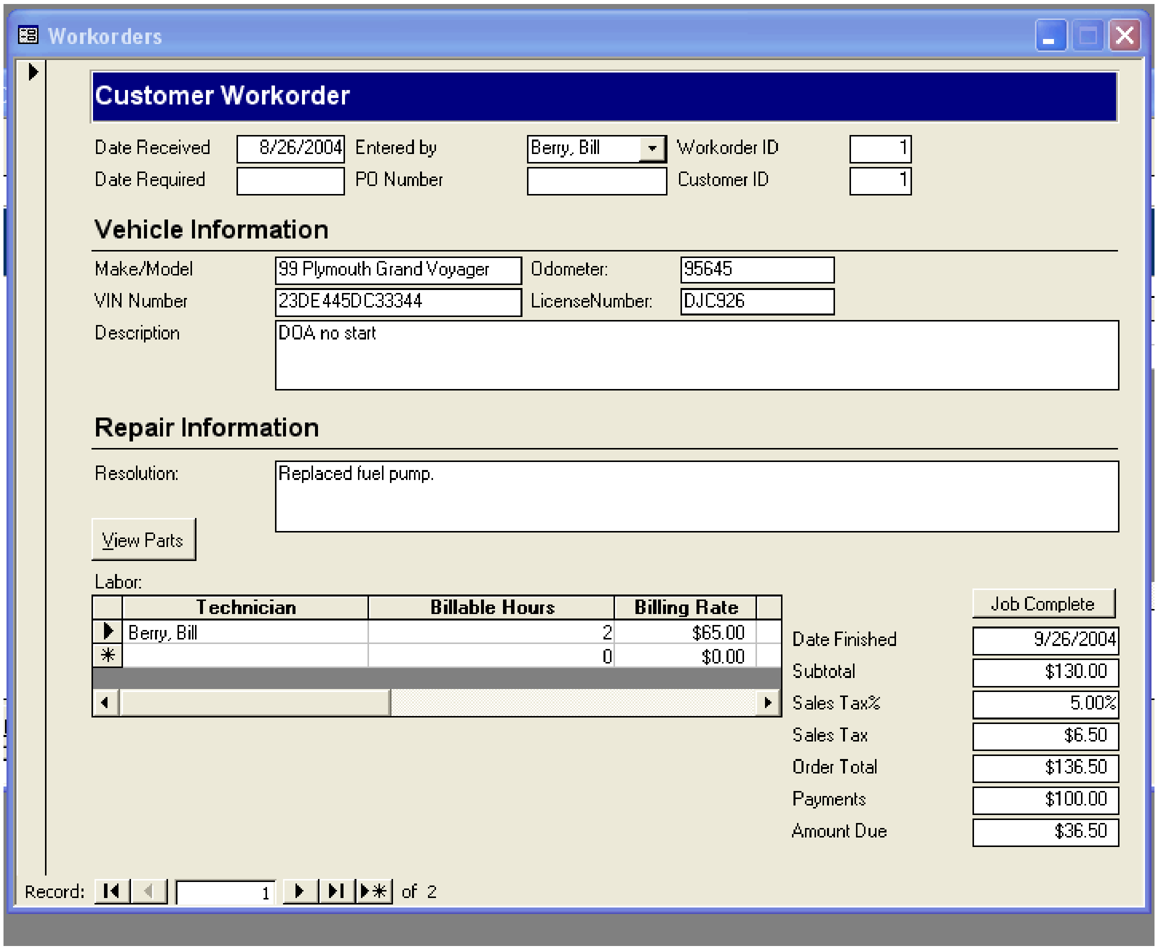
Create Customer Information

You are now ready to enter workorders. You do this through **Enter/View Workorders** in the main panel.



You can then click on the **Workorders** button to choose the selected record (note where the arrow is in the Workorder Information screen) or doubleclick to open.

To create a new record, choose the new button  from the navigator bar.



Here is the workorder for your customer. Using the navigator buttons will take you through the workorders the customer has or you can click on the new button  to create a new record for this customer.

Parts and Labor

Notice the **View Parts** button. Clicking on this button will change the view in the box below from **Parts** amounts to **Labor**. By clicking on the button you toggle between the two views.

Since you can list many parts in the database I used generic categories because I could charge any amount for the part for that workorder. In other words the brake pads for one job may be priced differently for one job than it would for another job.

Job complete button.

The reports are tracked by date. When you click on the **Job Complete** button this indicates that the technician has finished the job and it is ready for payment and pickup by the customer.

When the customer pays for the job you enter the payment information with the **Payments** button in the **Workorders by Customer** panel. This will flag the job as being paid for your reports.

Reports

- **Balance Due Report** – this is a list of jobs that have been completed and the customer paid partial payments. It shows the total amount and the amount left to be paid.

- **Finished Workorders by Date –** This is a date driven report showing the jobs have been marked completed (the **Job Complete** button).

- **Hours and Services –** This report lists the hours logged for each job by technician name. This is useful if you are paying your techs by the billed hours for each job.

- **Sales by Date –** this is a date driven report showing the total parts and labor for that time period. This is useful for tracking your sales tax totals.

- **Unfinished Workorders** – This report is for the jobs where the **Job Complete** date is not filled in. This is useful for keeping track of what jobs you have out in the shop that your technicians are still working on.

- **Unpaid Workorders –** This is for the jobs that are complete but not yet paid for by the customer.

- **Export Customers –** This will save your customer data to an external file. This is useful for backup purposes or if you wish to generate labels for mailing.