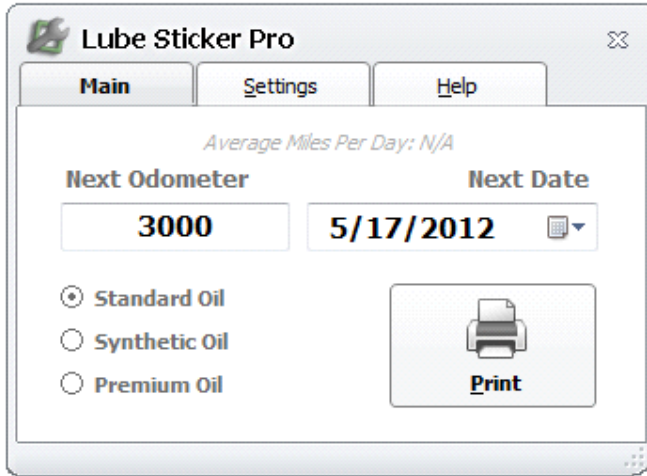# PROPACK

# Lube Sticker Pro Setup

## Main Screen



From this screen you will see the calculated Next Odometer and Next Date. You can change between your three oil intervals and it will recalculate the values. At the top, the vehicle's Average Miles per Day will be displayed if it is available.

**Note:** The odometer will be read from the odometer box in your shop management software before the calculations are applied, so make sure these values are filled in before loading Lube Sticker Pro.
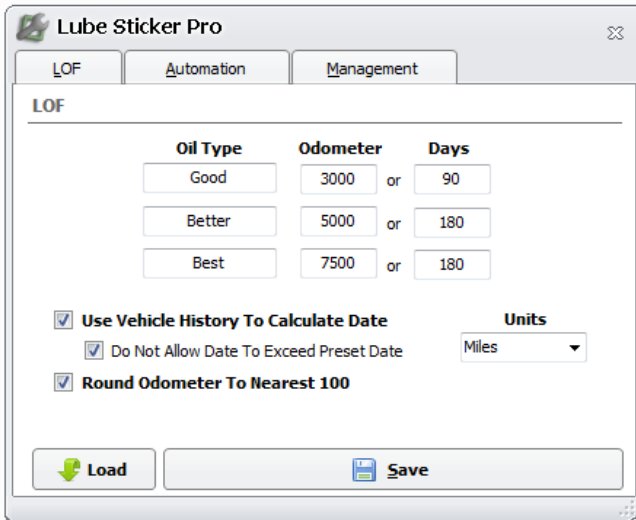
**Print:** Click this button to print the lube sticker, and to initiate any automation you have set up. Lube Sticker Pro will close automatically after clicking.
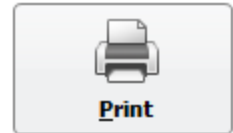


## Settings Screen

### LOF



**Oil Type:** You have the ability to set three separate oil types and intervals. Here you can rename the default oil type names to whatever name you choose, Example: Standard, Semi-Synthetic, and Synthetic.

**Odometer**: Set the default odometer interval for each oil type.

**Days:** Set the default time interval for each oil type.

**Use Vehicle Usage To Calculate Date:** Checking this will calculate the Next Date based on the customer's vehicle usage, instead of using a set amount of days.

**Do Not Allow Date To Exceed Preset Date:** Checking this will make sure the date is never over the days interval you have set if you are using the vehicle usage to calculate the date.

## Automation

**Auto Add Recommendation:** Check this to automatically add a recommendation to the vehicle after printing a lube sticker.

> Delete Old Recommendations: This option will delete old recommendations set by Lube Sticker Pro before a new recommendation is created.

**Auto Add Appointment:** Check this to automatically book an appointment after printing a lube sticker.

> Shop Open On: The calculated date will only fall on the days that are checked.

> Labor Hours: Default labor time for a LOF.

## Management

**Shop Management Type & ODBC Data Source:** This area will tell Lube Sticker Pro how to link up and get data from your shop management software. Do not change this unless instructed by technical support.

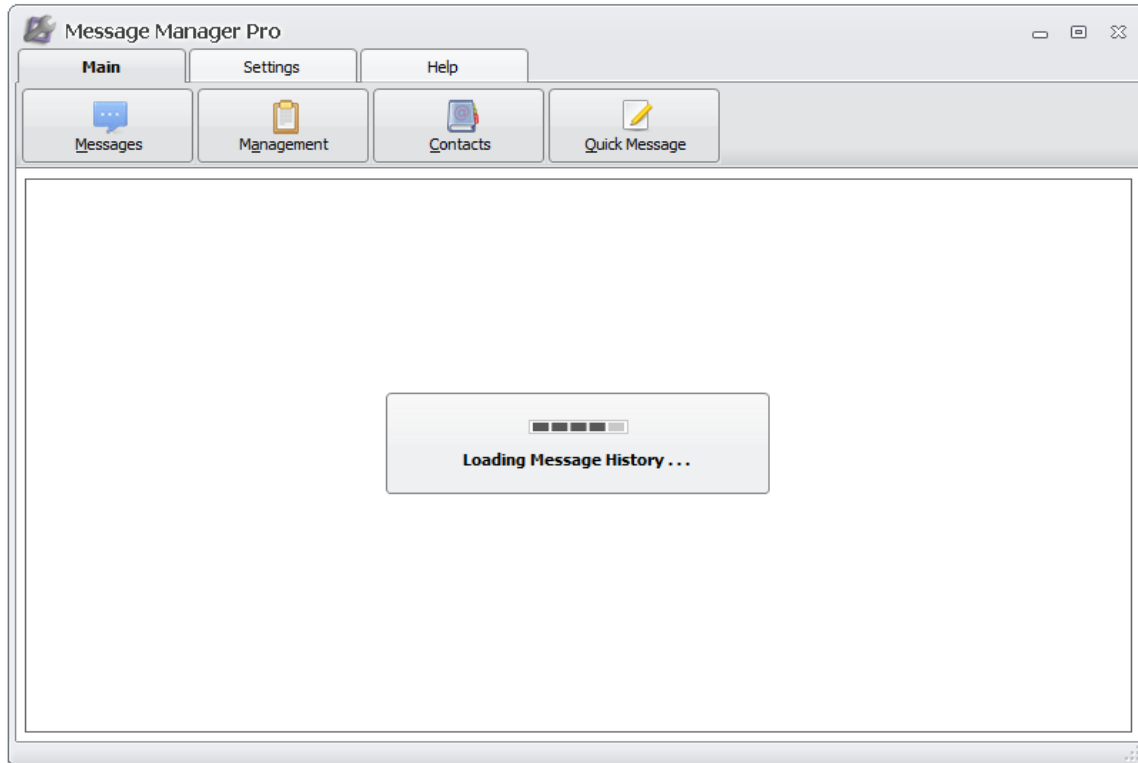**Printer & Printer Name:** In this area you set your printer type and name.

## Setup Printing / Label Template Screen

From here you can change the way your label will look when it prints.

# Message Manager Pro Setup

## Main Screen



 **Messages:** This is the main screen will allow you to view your most recent outgoing and incoming text messages. Double click on any item in the grid to load the send message screen.

 **Management:** On this screen you will be able to quickly view many important areas of your shop management system. To the left you will see your Work In Progress, to the right you will see your calendar. Click on any date of interest and you will be able to view appointments scheduled for that date or recommendations due for that date. Double clicking on any item in any of the grids will bring up the send message screen.
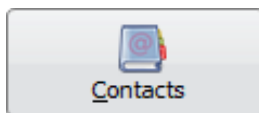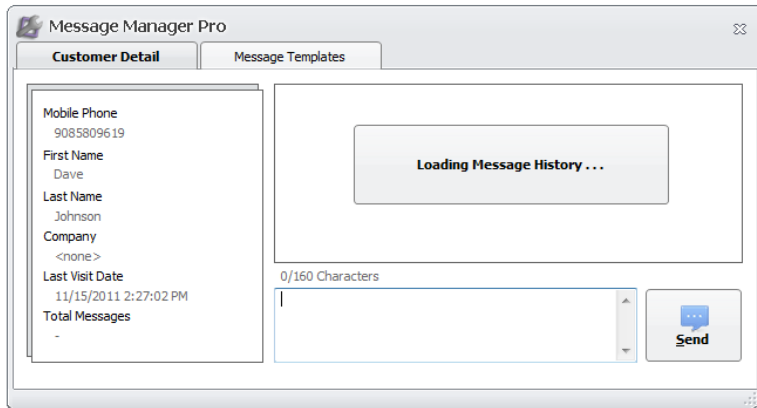
 **Contacts:** From this screen you will be able to access any customer in your system. Select the first letter of the customer's last name or company name, find them in the list, then double click their name to bring of the send message screen.

 **Quick Message:** This button will search for the current work order you have open and bring up the send message screen for that customer.

## Send Message Screen



From this screen you will be able to send a new message to a specific customer and view your messaging history with that customer. By clicking the **Message Templates** button, you can quickly load common text messages, saving you the time of re-typing it every time.

## Message Templates Screen
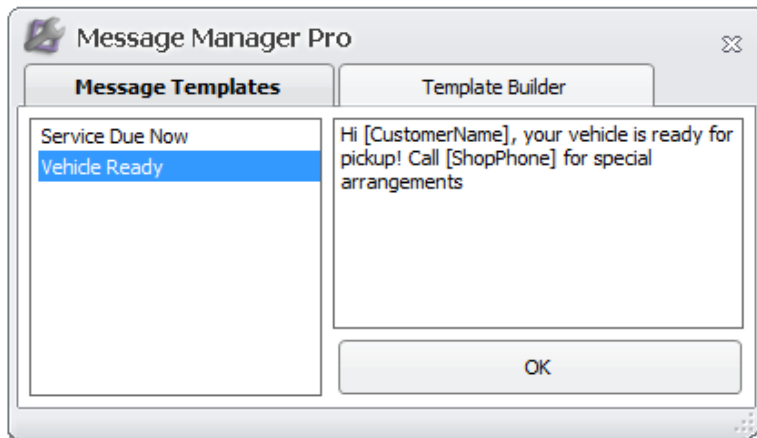


This is the screen where you can access your commonly used messages. Click the template title on the left and click **OK** to send the template back to the send message screen. Any values surrounded in [brackets] will be replaced with the actually value in the send message screen. Click the **Template Builder** button to create new templates that you will be able to access from this screen.

## Template Builder Screen
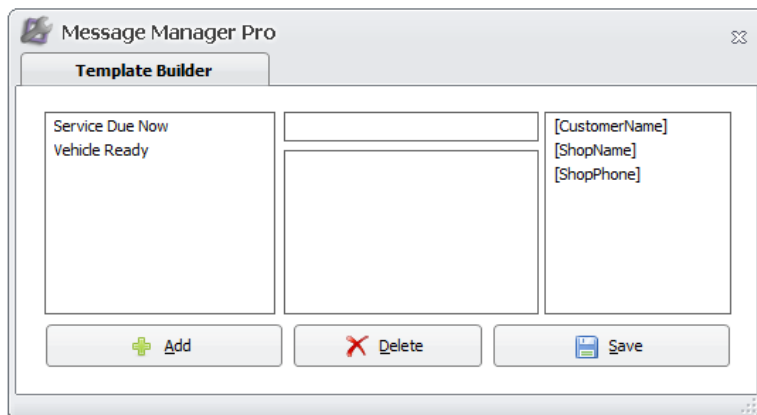


This is the screen where you are able to design and save new templates for future use. The box on the left will show a list of all of your templates. The middle boxes show the template name and template message. The box on the right will show a list of 'hot values' (these values will be replaced with their actual values in the send message screen).
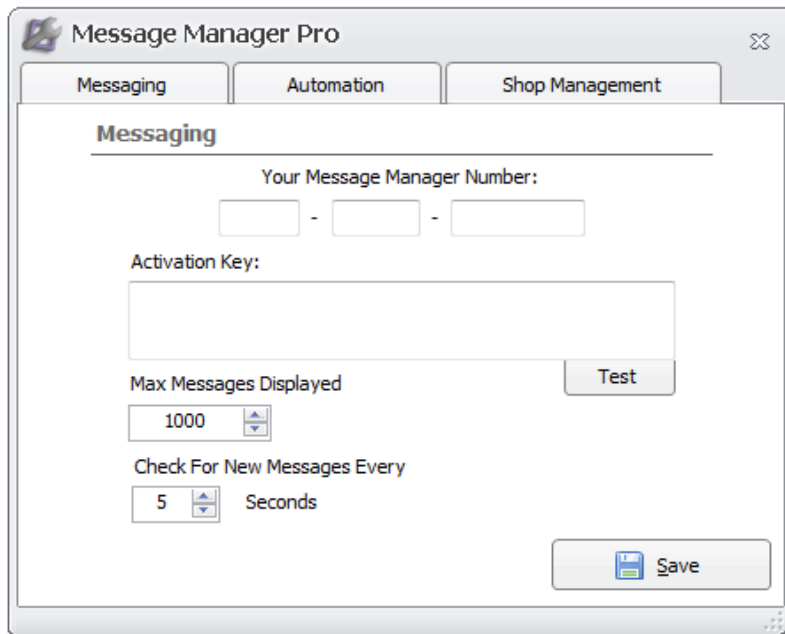
**To Create A New Template:** First click the **Add** button; this will add a new item to the template list on the left. Click the newly added item and edit the template to the desired title and message. Click **Save** when you are finished with the changes.

**To Modify A Template:** Click the template that you want to modify in the box on the left. Edit the template to the desired title and message in the middle boxes. Click **Save** when you are finished with the changes.

**To Delete A Template:** Click the template that you want to delete in the box on the left. Click **Delete** to remove it.

# Settings Screen

## Messaging



**Your Message Manager Number:** This is your own personal messaging number that you will send and receive text message from. Technical support will provide this for you.

**Activation Key:** This is the unique code that will link with your message manager number. Technical support will provide this for you.

**Max Messages Displayed:** This number is the maximum amount of incoming and outgoing text messages that will be displayed in your messaging history. The default number is 1000 messages, lowering this number may be recommended for computers with poor performance.

**Check for New Messages:** This number is the amount of time in seconds that message manager will check for new messages and refresh the message history. The default amount of seconds is 5, increasing this number may be recommended for computers with poor performance.

## Automation

**Send Automatic Text Message Reminders:** Check this box if you would like to send out automatic text message reminders. This feature will read your shop management scheduler and send out the messages based on the options you select below.
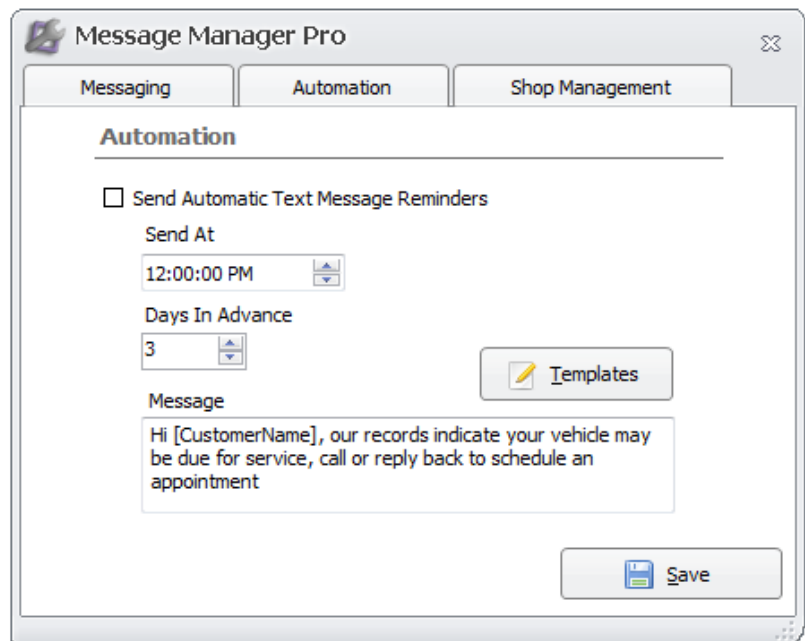
> **NOTE: This should only be checked off on *one* computer or duplicate text messages will be sent.**

**Send At:** This is the time of day you would like the reminders to be sent out

**Days In Advance:** This is how many days before the appointment you want the message to be sent out.

**Message:** This is the automatic message that the customer will receive. Click the **Template** button to apply one of the pre-built templates.

## Shop Management

Message Manager Pro

| Messaging | Automation | Shop Management |

### Shop Management

○ Mitchell / Shopkey 6
◉ Mitchell / Shopkey 5

ODBC Data Source:

Shopkey Management 32 ▾

Primary Cell Phone        Secondary Cell Phone

Cellular ▾               ▾

💾 Save

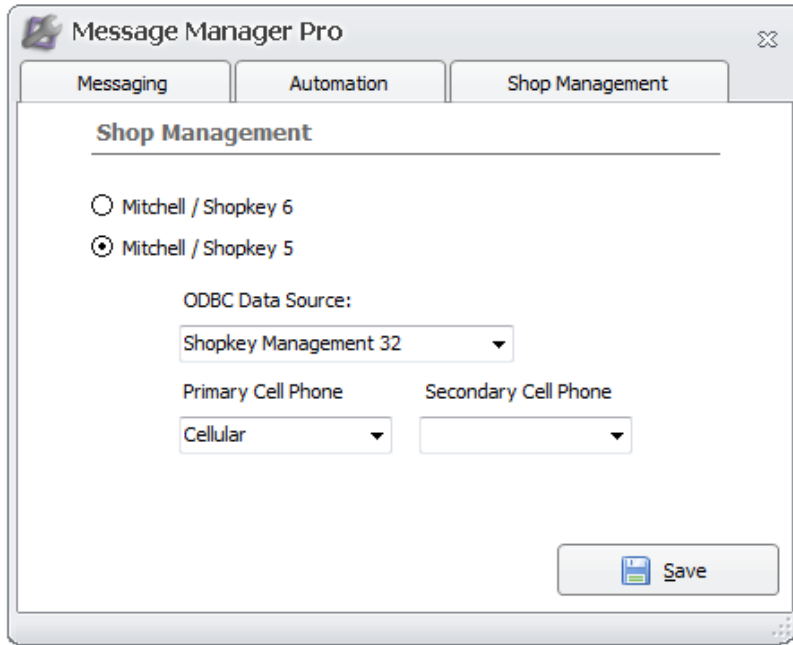**Shop Management Type & ODBC Data Source:** This area will tell Message Manager how to link up and get data from your shop management software. Do not change this unless instructed by technical support.

**Primary Cell Phone:** This value should be the main cell phone category of your shop management system. Some common values are 'Cell', 'Cellular', or 'Mobile'. Setting this will allow Message Manager to distinguish between a cell phone that can receive text messages and a home phone number that cannot receive text messages.

**Secondary Cell Phone:** Only set this if you have more than one cell phone category, otherwise leave this blank. A common scenario for using a secondary cell phone is if you have two cell phone categories.

# Report Pro

## Settings

Currently our solution needs three settings applied in order for your Report Pro tool to process correctly.

## Reports

Location of your Report Repository, most likely this will be a local directory (standard installation will be C:\BOT\Reports\)
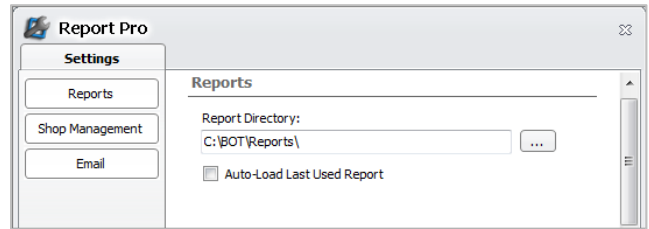
## Shop Management
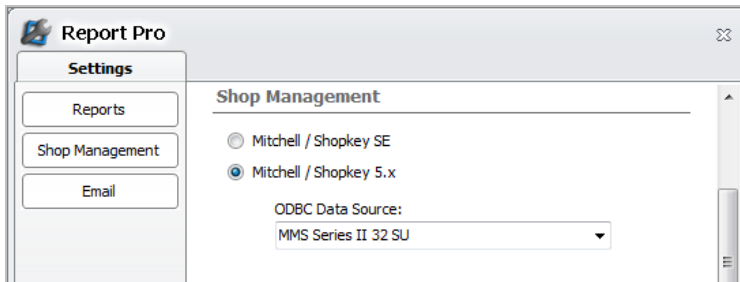
Shop Management version that you are connecting to

- Manager / Manager Plus 5.9
- Manager / Manager Plus 6.X
- ODBC Data Source

## Email

- Select you email provider by choosing from our simple drop down list for the most commonly used email domains or select custom.

- Supply your email address

- Supply your email password

- Choose your email display name. This is what is shown in the From section of the email.

**\*\*NOTE: If you receive an authentication error, try using your email address as your email display name. Additionally you may need to verify that your email server has the proper SMTP permissions.\*\***
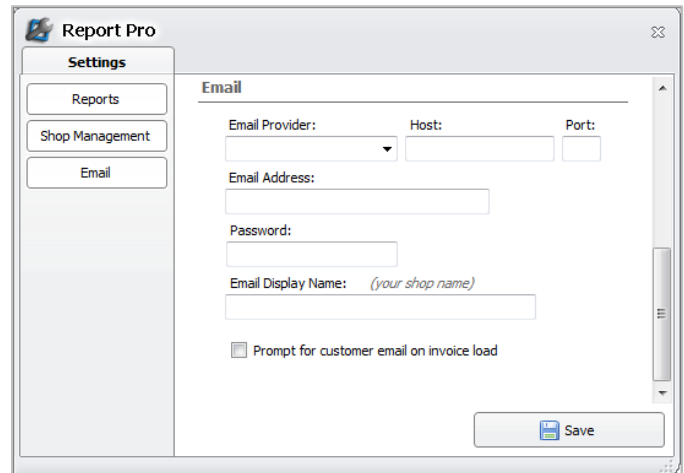
## Customize

Our invoice customize section is filled with numerous requests on how the invoice should look and feel, so rather than asking us to design your invoice, we put you in the driver's seat. Buckle up, the fun is about to begin with all the bonus features that you can control to present the invoice the way you want to your customer.

**Header**
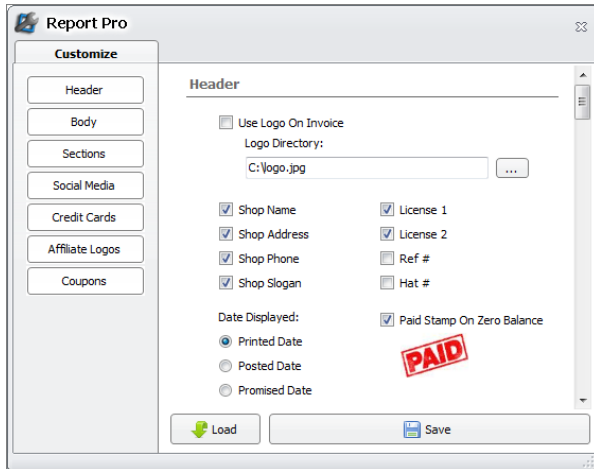


**Use Logo on Invoice**
When selected the logo in the specific mapped logo directory will appear in the upper left corner of your invoice.

**Logo Directory**
This is the specific location that the logo exists. It is recommended that you create a mapped network drive on your server so that the directory path is the same for all workstations.

**Shop Name**
Display your shop name as it appears in your management system

**Shop Address**
Display your shop address as it appears in your management system

**Shop Phone**
Display your shop phone as it appears in your management system

**Shop Slogan**
Display your shop slogan as it appears in your management system

**License 1**
Display your shop license 1 as it appears in your management system

**License 2**
Display your shop license 2 as it appears in your management system

**Ref #**
Display the Ref # entered for the invoice

**Hat #**
Display the Hat # entered for the invoice

**Date Displayed**
Choose which date is displayed on the invoice

**Printed Date**
Selected by default since it represents the most frequently used date for invoices.

**Posted Date**
Commonly used when reprinting an invoice from history.
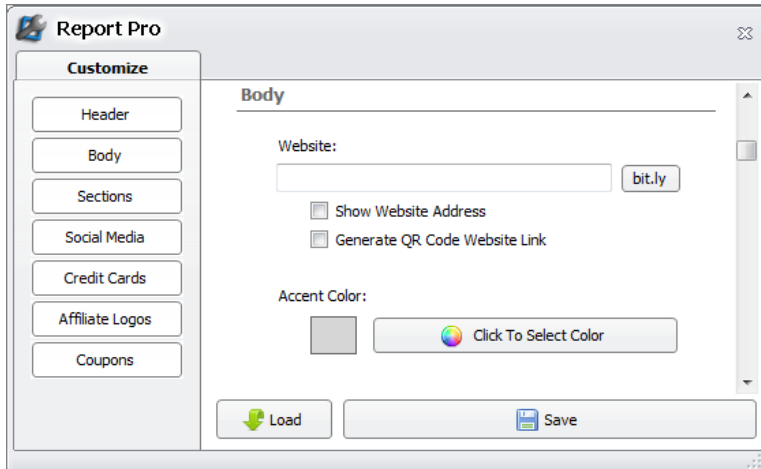
**Promised Date**
Commonly used when printing invoices to submit for payment after the work is completed, such as Fleet accounts.

**Paid Stamp on Zero Balance**
Display a paid stamp on invoices when the balance is $0.00.

**Body**



**Website - Show Website Address**
If you add a web address, your logo when emailing your invoice to your customer will now become a hyperlink to the domain that you entered.
You decide if you want that address visible on your invoice

**Generate QR Code Website Link**
You decide if you want to print a QR Code to allow smart phone users to open that link on their mobile device.
Selecting to show the QR Code requires an internet connection

**You could also try entering a link to your review site with show website address unchecked and generate QR code checked.**

**Accent Color**
Select the highlight accent color that is used for highlighting by the job sub-total information for the Classic invoice template.

**Part Prices**
Turn part prices on or off with a simple check box

**Part Numbers**
Turn part numbers on or off with a simple check box

**Show Labor/Parts Job Total**
Turn Labor/Parts on or off with a simple check box for the by the job sub-total display

**Show Sublet Job Total**
Turn Sublet on or off with a simple check box for the by the job sub-total display

**Show Watermark Across Page Background**
By default the first letter of your shop's name will display/print as a watermark. A maximum of two custom letters can be used for watermark generation.

**Force Jobs to Group Together**
Jobs will be grouped together for adequate by the job invoice display and printing.

**NOTE: It is up to your service writers to structure the invoice in your management system correctly for this to create the expected result. This is done by making sure that parts immediately follow the labor line that they are associated with, otherwise the result is undesirable.**

## Sections
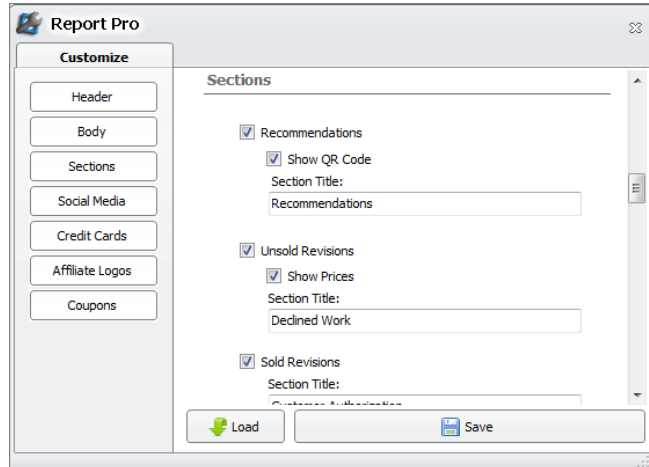


Each section has a "Section Title" for customizing the label that is displayed when printed on the invoice. Keep in mind that recommendations are different than sub-estimates (Revisions) so wording should be chosen attentively with regards to your utilization of the Management System functionality.

### Recommendations
Check the box if you want to show future recommendations on the invoice you provide to your customer. A maximum of three future recommendations will be displayed If you have previous recommendations the first recommendation will state "Please refer to previous invoices for recommendations"

### Show QR Code
Generate a future appointment QR Code to the Recommendation section. The QR Code will enable smart phone users to put the scheduled appointment into their smart phone device
**\*\*Selecting to show the QR Code requires an internet connection\*\***

Add your personal title to the Recommendations section Example: Things to Remember

### Unsold Revisions
Unsold Revisions will display the top line from Revisions as a header of work listed in Revisions

- We ONLY look at Revisions 1 through 4
  The top line should be a labor line
- We display the work requested
  - Should be a short "Title" expression
  - Example: Four Tires & Alignment
  - Add your personal title to the Unsold Revisions Section
  - Example: Declined Work

### Show Prices
Optional to turn quoted pricing on or off

- Revisions (Sub-estimates) are designed to contain a single job per sub-estimate (Revision). If your implementation is to build more than one job per Revision tab, we recommend turning off prices since only the first line is displayed with total dollars for the sub-estimate which could create the perception that a job is more expensive than it actually is.

### Sold Revisions
Sold Revisions is the documentation that occurs when your customer authorizes the purchase of a sub estimate that you quoted them

- When you "sell revisions" through the Management system this documentation will become available
- Add your personal title to the Sold Revisions Section
- Example: Customer Authorization

### Discount Section

When a discount is added to your customers invoice this section will display "loud and proud"
Technology is smart enough that if the discount is $0.00 it will not display Add your personal title to the Discount
Section.   Example: Today You Saved:

## Social Media

**Facebook**
- If you have a facebook.com site then simply check the box that you want the icon to display
- In the text box provided add the URL (website path) to your Facebook page
  - When the invoice is emailed it becomes a link

**Twitter**
- If you have twitter.com account then simply check the box that you want the icon to display
- In the text box provided add the URL (website path) to your twitter page When the invoice is emailed it becomes a link

**LinkedIn**
- If you have linkedin.com account then simply check the box that you want the icon to display
- In the text box provided add the URL (website path) to your LinkedIn page
  - When the invoice is emailed it becomes a link

**YouTube**
- If you have youtube.com account then simply check the box that you want the icon to display
- In the text box provided add the URL (website path) to your YouTube page
  - When the invoice is emailed it becomes a link

**SureCritic**
- If you have surecritic.com account then simply check the box that you want the icon to display
- In the text box provided add the URL (website path) to your SureCritic review page
  - When the invoice is emailed it becomes a link
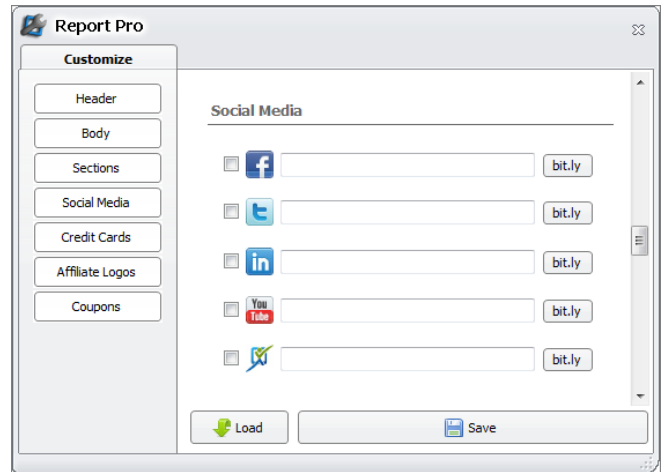
## Credit Cards
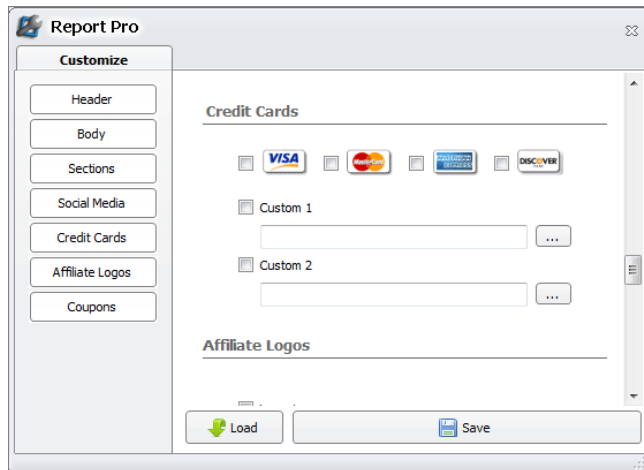
Print the credit cards that you accept on your invoice. Simply check the check box next to the credit card image if your business accepts that form of payment

- Visa
- Master Card
- Discover
- American Express

We have provided two custom credit card settings for the user to apply their own fleet card or a Tire card

- Download the artwork from the internet
- Point the software to the downloaded artwork
- Check the Check box to display

## Coupons

Coupon section allows you to add marketing to your invoice for your customer to review after they leave your shop. In this section you can

- Customize up to three marketing messages. They do no need to be discounts or coupons.
- You control the content. Try advertising services that you provide, and would like to sell more of.
- Each individual header
- Each individual body
- And 1 disclaimer text value. Changing this in one, changes it in all three
  - The coupons in classic and modern view will print at the bottom of your customers invoice
  - The coupons in horizontal view will print on the left side real estate that is available
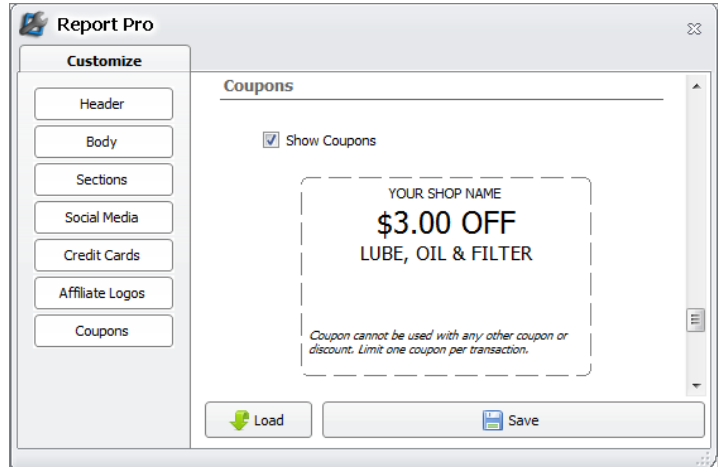
**NOTE: Your Shop Name is displayed as it appears in your shop management setting.**

**NOTE: The selection is all or none, so be sure to complete all three when displaying.**