

PROPACK

Report Pro Setup and Settings

Settings

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

- Location of your Report Repository, most likely this will be a local directory (standard installation will be C:\BOT\Reports\)
- Shop Management version that you are connecting to:
 - Manager / Manager Plus 5.9
 - Manager / Manager Plus 6.X
 - ODBC Data Source
- Your Email Settings
 - Choose from our simple drop down list for the most commonly used email domains
 - Supply your email address
 - Supply your email password

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 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 Information

- If you use preprinted letterhead paper you will like the fact that you can turn on and off the following items
 - Shop Name
 - Shop Address
 - Shop Phone & Fax
 - Shop Slogan
 - Shop License 1
 - Shop License 2
- Adding your company logo
 - To add your logo simply click on the ellipses button and navigate to your logo
 - Click the check box to print the logo on your invoice

Body Section

- Adding your web 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
 - 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)
- Part Prices
 - Turn part prices on or off with a simple check box

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"
 - Add a future appointment QR Code to the Recommendations 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
 - Optional to turn quoted pricing on or off
 - Add your personal title to the Unsold Revisions Section
 - Example: Declined Work

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 a 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
- Linked In
 - If you have a 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 a 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
- Sure Critic
 - If you have a 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
 - If you take a 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

- The Coupons 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
 - You control the content
 - Each individual header
 - Each individual body
 - And 1 disclaimer text value
 - The coupons in classic and modern view will print at the bottom of your customer's invoice
 - The coupons in horizontal view will print on the left side real estate that is available