

# Getting Started

Information for Getting Started with iAutoFocus Collision Management System

***iAutoFocus***<sup>TM</sup>  
**Version 8**

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NEWERA SOFTWARE IAUTOFOCUS VERSION 8

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Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Title: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State & Zip: \_\_\_\_\_  
Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

NEWERA SOFTWARE

# Quick Start User Guide



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# Getting Started with iAutoFocus

Welcome to NewEra Software's iAutoFocus Collision Management System, a complete, integrated management system for the auto collision shop. Version 8 of iAutoFocus introduces many new features to the iAutoFocus product, including improved cycle-time tracking, better workflow management, and improved reporting.

When installing iAutoFocus for the first time, you will need to make several choices. This manual will guide you through the process of installing and configuring iAutoFocus Collision Management Software.

## iAutoFocus Version 8

iAutoFocus Version 8 is the most reliable, easy to use and manage version to date. Enhancements to iAutoFocus allow you to better track cycle-time and job status throughout the repair process. Additionally, iAutoFocus Version 8 streamlines many processes, enabling you to spend less time managing jobs in iAutoFocus.

NewEra Software, makers of iAutoFocus, has been producing collision and mechanical shop management software since 1984. Version 8 is the latest incarnation of iAutoFocus, NewEra Software's collision management software.

### **If You're New to iAutoFocus**

If you're not familiar with iAutoFocus, it's easy to get started. The following illustration shows the main iAutoFocus screen (or grid), which appears when you start up iAutoFocus. The main grid gives you quick access to common information, such as the number of jobs currently in the shop and general information about each one. From the main grid you can also easily access more detailed information and perform other tasks, such as labor allocation and parts ordering. You will find that as you get familiar with just a few steps initially then the rest of the pro-

gram will become easy for you to navigate and explore on your own.



iAutoFocus Main Screen

### If You've Used iAutoFocus Before

If you've worked with earlier versions of iAutoFocus before, the transition to Version 8 should be smooth and easy. You should be able to navigate the program as you did prior; noticing the additional features designed to enhance your ability to manage your shop.

## Before You Begin

### Minimum Hardware Requirements

Before you install iAutoFocus Version 8, make sure your computer meets the following minimum hardware requirements:

- 1 GHz processor or faster
- 256 megabytes (MB) of RAM
- 200 MB of free hard drive space
- 28.8k or faster Internet connection
- SVGA 800x600/True Color-capable video card
- CD-ROM Drive
- Internet Explorer 6
- Windows™ 2000 (Service Pack 3 or later), or Windows™ XP (Home and Professional Editions)

NewEra Software recommends the following hardware configuration:

- 2.4 GHz processor or faster
- 512 megabytes (MB) of RAM
- 200 MB of free hard drive space
- High-speed Internet connection (T1, Cable Modem or DSL)
- SVGA 1024x768/True Color-capable video card
- CD-ROM Drive
- Internet Browser
- Windows 7 Professional

For shared/network installations, iAutoFocus supports the following server operating systems:

- Peer-to-peer configured Windows™ 2000 or Windows™ XP (Home or Professional Editions) with Windows™ 2000, Windows™ XP (Home and Professional Editions), or Windows 7 clients.
- Client/Server configured Windows™ 2000 Server (any Edition) or Windows™ 2003 Server.

# How to Obtain Support

Whether you are new to iAutoFocus or upgrading from a previous version, the following resources can help you get the most out of your purchase.

## **Getting Started Manual**

This book provides you with many general procedures and information about using iAutoFocus. You can also access this manual within iAutoFocus by clicking on Help...Getting Started.

## **For Customers with a Support Contract**

If you have a current support contract, you can contact NewEra Software via our toll-free number at (877) 447-4707. Assistance is available Monday through Friday from 9AM to 5PM, Mountain Time, except for national holidays and weekends.

Support for specific incidents or for general training can be scheduled after normal support hours on a case-by-case basis and will incur a separate charge. Please contact your NewEra support representative to schedule a time if you require help outside of regular support hours.

Support is also available via email by sending messages to [support@newerasoftware.com](mailto:support@newerasoftware.com).

## **For Customers without a Support Contract**

If you do not have a current support contract, you can contact NewEra Software via our regular support number at (801) 447-4707. Please be aware that hourly service charges will apply to all support calls when no support contract is in force. Assistance is available Monday through Friday from 9AM to 5PM, Mountain Time, except for national holidays and weekends.

## **On-Site Training and Support**

On-Site training and support is available for customers with special needs. Please contact your NewEra support representative for information on scheduling an on-site visit. Please be aware that hourly service rates and travel charges will apply for all on-site training and support.

# Installing iAutoFocus

The iAutoFocus Setup Wizard copies the necessary program files to your hard disk. When the installation is completed, you can begin configuring iAutoFocus for use in your shop. Note that your computer may need to be restarted several times during Setup depending on your operating system configuration.

## If You're Installing a New Copy of iAutoFocus

If you have never installed iAutoFocus on this computer, or if you have already uninstalled iAutoFocus on this computer, you will use the following method to install iAutoFocus Version 8.

### Downloading iAutoFocus Version 8 from the Internet

By Appointment, a NewEra Support Representative will download iAutoFocus Version 8 from NewEra Software's website, and browse to the folder where you saved the file using Windows Explorer or other browser. The Support Representative will extract its contents to a specific location and help you with your company's setup.

### Obtaining the Latest Software Upgrade

Updates for iAutoFocus can be obtained by browsing to the following address using Internet Explorer: <http://www.newerainc.com/support.html> . After downloading any updates, double-click on them in Windows Explorer, then click 'Unzip' to install them. iAutoFocus will then be updated. This process needs to be repeated on each station that has iAutoFocus installed. Note: iAutoFocus must be closed on the workstation being upgraded or you will receive an error.

## If You're Updating an Existing Copy of iAutoFocus

If an older version of iAutoFocus is already installed on this system, you may need to uninstall the old version of iAutoFocus before you can upgrade to Version 8. You can check which version of iAutoFocus is installed by clicking on Help...About on the iAutoFocus menu. The release number is located in the black bar at the top of the window as pictured below.



iAutoFocus Version 8 Help...About Screen

For information on contacting NewEra Software's Technical Support, see "How to Obtain Support"

### Launching iAutoFocus

Note if you are running the application on more than one workstation and this is the first workstation that has been upgraded, you will need to ensure all other iAutoFocus users have exited the software at this point so that the data files can be upgraded.

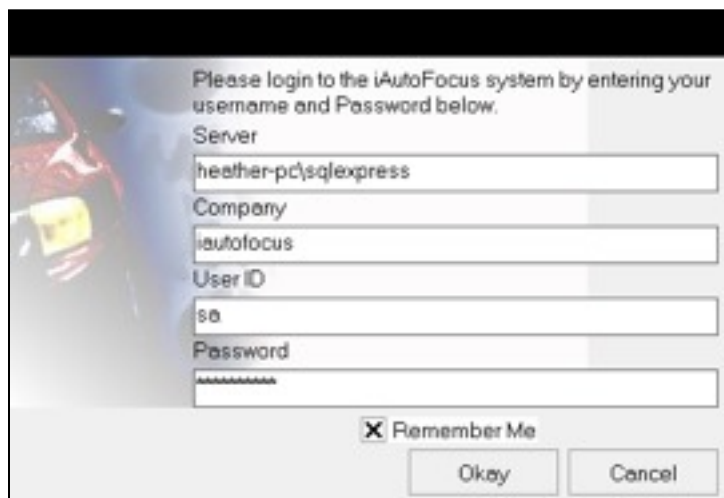
You can start iAutoFocus Version 8 by either double-clicking on the iAutoFocus icon on the desktop,



or by clicking on iAutoFocus on your program menu.



You will be prompted to enter a user name and password, as pictured below.

A screenshot of the iAutoFocus login dialog box. The dialog has a title bar and a background image of a fire truck. The text reads: "Please login to the iAutoFocus system by entering your username and Password below." There are four text input fields: "Server" (containing "heather-pc/sqlexpress"), "Company" (containing "iautofocus"), "User ID" (containing "sa"), and "Password" (containing masked characters). Below the fields is a checkbox labeled "Remember Me" which is checked. At the bottom right are "Okay" and "Cancel" buttons.

iAutoFocus Version 8 Login Screen.

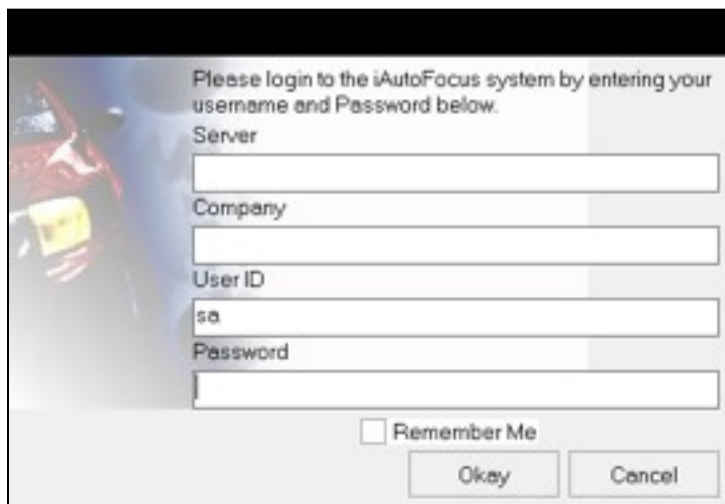
After entering your username and password, click on 'Okay' to login to iAutoFocus. Please note that username's and passwords are NOT case-sensitive.

## Creating Your Database

### Creating a New Company

Follow these short steps to create a new shop database (generally your Support Representative will assist you with this process):

1. Launch iAutoFocus Version 8 either by double-clicking on the iAutoFocus Version 8 icon on your desktop, or by clicking on iAutoFocus Version 8 on your program menu.
2. Click on File on the menu and then choose New Company.



iAutoFocus Version 8 New Company

3. Your Support Representative will Type in the Server name in the "Server" field, iAutoFocus in the "Company" field, the user id, and password. Then he/she will Check the "Remember Me" box and click "Okay".

# iAutoFocus Setup

iAutoFocus Version 8 provides a Setup Wizard to help you set up and customize your iAutoFocus program. This section will take you through the steps to necessary to begin using iAutoFocus Version 8.



iAutoFocus Version 8 Setup Wizard

To start the iAutoFocus Version 8 Setup Wizard, click on File... Setup from the iAutoFocus menu.

There are several steps to configure iAutoFocus Version 8. Each step is described in more detail below.

The following steps are required in order to use iAutoFocus Version 8:

- Company Information
- General Ledger Codes

The following steps are not mandatory, but highly recommended:

- Security
- File Locations
- Departments
- PO Setup (Purchase Orders)
- AutoComplete/AutoSave
- Scheduling

The following steps are completely optional:

- Invoice Setup



- Zip Codes
- User-Defined Fields
- Import Translation

### Company Information Screen

The Company Information screen allows you to set general information about your company, as well as global options for this database. The General tab of the Company Information Screen is

The screenshot shows the 'iAutoFocus - Company Information Settings' dialog box with the 'General' tab selected. The fields are filled with the following information:

- Company Name: Body Shop
- Federal Tax ID: 987-087587595
- State Tax ID: (empty)
- Phone Number: (801) 555-1212
- Fax Number: (801) 555-1213
- SMTP Server: mail.smtpserver.com
- Reply-to Address: parts@bodyshop.com

Options and checkboxes:

- Use estimating system RO#s
- Generate Supplements in FM
- Work Order Locking (with 'Mgr.' button)
- Password Protect Closed RO's
- Promote Techs by Hours Flagged
- Combine estimate totals
- Use Responsibility
- Close RO with Unpaid Labor
- Protect Work Order Fields

Additional settings:

- Place Notes Cursor:  Start  End
- Lock billed invoices on or before: 1 / 6 / 2006 / Password
- Accounting System Export Format:  QuickBooks  BusinessWorks  PeachTree

Buttons: Okay, Cancel, Apply

pictured below.

iAutoFocus Version 8 Company Information General Tab

Enter your Company Name, Federal Tax ID, State Tax ID, Phone and Fax Numbers on this tab.

If you intend to use the e-mail facility in iAutoFocus to send e-mails to your customers, vendors and insurance companies, you will need to fill in the **SMTP Server** and **Reply-to Address** fields. These fields allow you to specify your outgoing mail server and the default email address all messages will be stamped with. If you are unsure of your mail settings, contact your e-mail provider or NewEra Technical Support for additional information.

When checked, the **Use estimating system RO#s** option causes iAutoFocus to use the RO Number assigned by the estimating

system when importing estimates. If you have only one estimating system, or if you manually enter your repair order numbers in your estimating system, you should check this box. Otherwise, iAutoFocus will override the estimating system's repair order number with an auto-incrementing invoice number set from the invoice setup screen.

The **Generate Supplements in PM** option will allow the user to generate supplements right from the Parts Management section of iAutoFocus. Warning: Choosing this option will cause the original estimate to vary. It is suggested that the user use the estimating system to create the supplement and re-import the estimate back into iAutoFocus.

The **Work Order Locking** option will allow the users to be notified if another user is already viewing/editing a workorder. Since only the last user's changes will be saved, this is an important feature to turn on to ensure you are saving the most up-to-date information.

The **Password Protect Closed RO's** option will require users to enter a password to access any workorders that have been marked as closed and billed by your accounting system. Once this item is checked, you will be prompted for a password. Use the "Mngr." button to the right of this option to manage or remove any locks prohibiting you from doing necessary work on the workorder. E.g. if a user is in a workorder and leaves for the evening without closing it and another user needs to make changes, an administrator might justify removing a lock on that workorder. Other reasons might be for a power failure, or system re-boot.

The **Promote Techs by Hours Flagged** option will allow you to view who the Primary technician is on a job in the reports section of iAutoFocus. When you assign a work order to the technicians, iAutoFocus will track how many hours each technician has flagged on that job and list the one with the most hours as the "Primary" technician for the job.

The **Combine Estimate Totals** option causes iAutoFocus to import all supplements as original estimates. This option is most useful when you are first importing your work-in-progress from your estimating system. After you have imported all of your work-in-progress, you should clear this option so that iAutoFocus can properly track supplement versus original estimate amounts. However, if you never want iAutoFocus to track sup-

plement versus estimate lines, you may leave this field checked. Note that estimate versus supplement totals in iAutoFocus will not be correct unless the file is imported into iAutoFocus before a supplement or additional supplements are created.

The **Use Responsibility** option causes iAutoFocus to import information about betterments, appearance allowances, and unrelated and related prior damage as a payment note on the work order screen. Anything that will affect the amount of the deductible will show here when this option is checked.

The **Close RO with Unpaid Labor** option will affect what happens when you mark a job as billed and send to accounting. Checking this option will allow you to indicate Yes, I want to Close the RO with Unpaid Labor or leave it unchecked to indicate No, I do not want to be able to close the workorder until all the Labor has been recorded and paid.

The **Protect Work Order Fields** option, when checked, will retain the customer information and address fields in iAutoFocus and any changes made in the estimating system (i.e. to a name or phone number) will not overwrite what is in iAutoFocus if re-imported into the system. E.g. This is helpful if a field was left blank in the estimating system (like a customer's phone number) and then an iAutoFocus User updates the phone number.

The **Place Notes Cursor** option allows the user to choose "start" or "end" depending on whether they prefer to add the newest notes to a work order at the beginning of the note field or newest notes and the end.

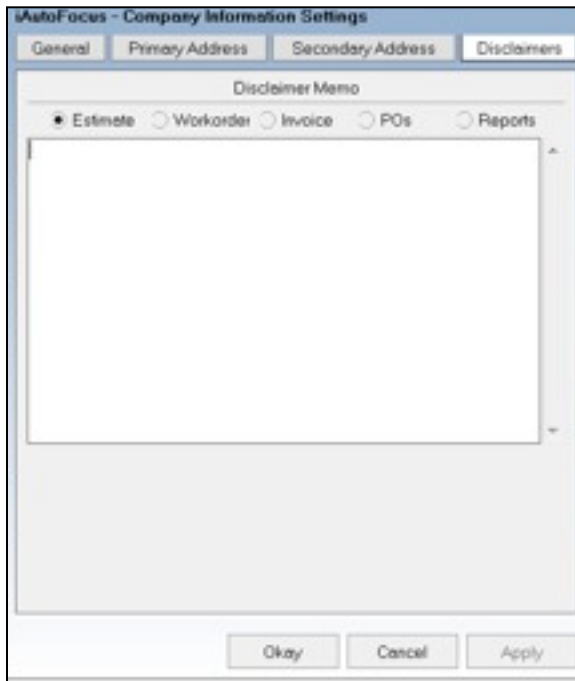
The **Locked Billed Invoices on or Before** date field. This is relatively the same option as Password Protect RO's option above (you can only choose one or the other) but this option allows the user to determine a date by which work orders on or before that time cannot be accessed without entering the correct password; also set up here.

The **Accounting System Export Format** option should be left at the default position, unless directed otherwise by NewEra Software technical support department.

Enter your shop's address information on the **Primary and Secondary Address tabs**. Note that Secondary Address was created for companies with a mailing address that was different from their physical address. However many shops are required to in-

clude EPA and BAR numbers as part of their address. If you wish to do this then you will need to enter your address into the Secondary Address section and your EPA and BAR number into the primary address lines so that it appears correctly on your print-outs.

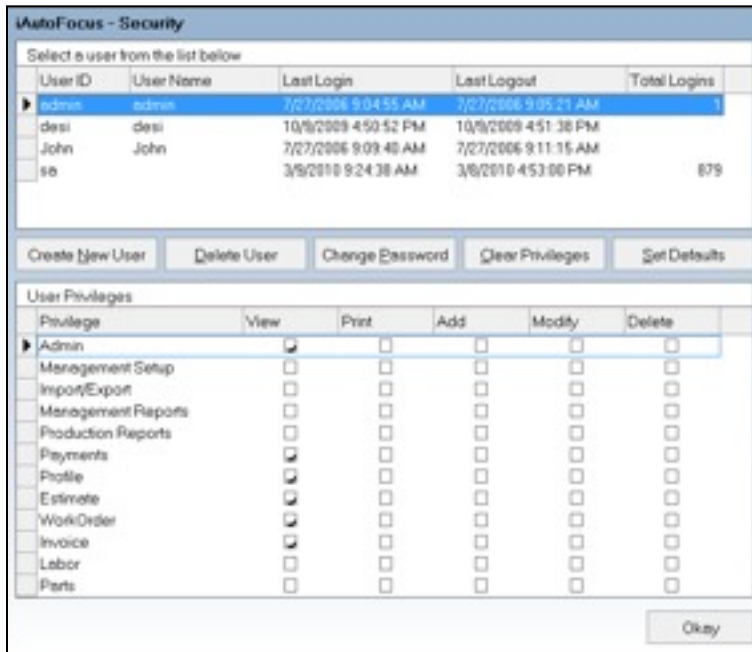
Disclaimers to be printed at the bottom of your Estimates, Workorders, Invoices, Purchase Orders, and Reports can be modified on the **Disclaimers** tab as shown below. E.g. On estimates, some collision center owners choose to add a disclaimer such as, "This is only an Estimate and does not cover additional parts and labor that maybe discovered later."



iAutoFocus Version 8 Company Information General Tab

### Security Screen

The security screen allows you to create users, and set access rights for that user. By default, there will be two or three users already set up for you; admin, sa, and webview (if you use our online communication software).



iAutoFocus Version 8 Security Screen

The Security screen is divided into two parts: The top half shows a list of users in the iAutoFocus system; the bottom half shows the privileges assigned to the user currently selected in the list at the top.

Click on **Create New User** and enter a user ID such as Rob, full name such as Robert Smith, and password (setting the password to the same as the user ID is helpful) as shown in the screen below. Use **Delete User** to delete users.

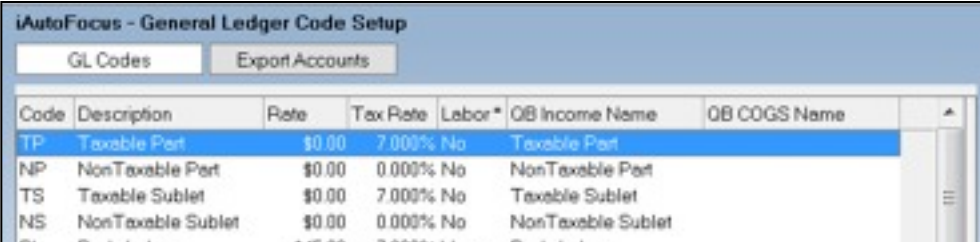
iAutoFocus Version 8 Security/Create New User Screen

Clicking **Change Password** allows you to change the user's password. **Clear Privileges** clears all privileges set for the currently selected user. Lastly, **Set Defaults** will reset the user's privileges to only allow them to View and Add Contacts, Payments, Estimates, Work Orders, and Invoices. Individual privileges are explained in detail in the bulleted list below.

Note: The first 5 options in the list is really a Yes or No option. If you choose "View" for Admin, Management Setup, Import/

Export, Management Reports, or Production reports, the user will have the rights to perform those functions. The rest of the list beginning with “Payments”, you will select whether the user will have permissions to view, print, add, modify, and or delete for each item listed. More information follows:

- The Admin privilege, for which you can only select the View option (which in this case means Yes), gives the user Administrative privileges; they will be able to add, change or delete anything in the system and can access all setup parameters.
- The Management Setup privilege allows the user access to the setup wizard, enabling them to modify all setup information. To turn this permission on for the user, click “View” (Yes).
- The Import/Export privilege allows users to import estimates from your estimating system(s). Only the View (Yes) option can be selected for this privilege.
- The Management Reports privilege allows a user to print out reports associated with shop management, such as labor and payroll information. Only the View (Yes) option can be selected for this privilege.
- The Production Reports privilege allows a user to print documents directly associated with a work order. The Invoice, Parts Worksheet, Estimate and Supplement Reports are all examples of Production Reports. Only the View (Yes) option can be selected for this privilege.
- The Payments privilege allows a user to view, print, add, change or delete payments as specified by the options chosen.
- The Profile (Contacts) privilege allows a user to add, change or delete contacts as specified by the options chosen.
- The Estimate, Work Order, and Invoice privileges allow a user to view, print, add, change, or delete Pending Work (Estimates), Work in Progress (Work Orders), and Completed Work (Invoices) as specified by the options chosen.
- The Labor and Parts privileges handled the same way.



The screenshot shows the 'iAutoFocus - General Ledger Code Setup' window. It has two tabs: 'GL Codes' (selected) and 'Export Accounts'. Below the tabs is a table with the following columns: Code, Description, Rate, Tax Rate, Labor\*, QB Income Name, and QB COGS Name. The table contains the following data:

Code	Description	Rate	Tax Rate	Labor*	QB Income Name	QB COGS Name
TP	Taxable Part	\$0.00	7.000%	No	Taxable Part	
NP	NonTaxable Part	\$0.00	0.000%	No	NonTaxable Part	
TS	Taxable Sublet	\$0.00	7.000%	No	Taxable Sublet	
NS	NonTaxable Sublet	\$0.00	0.000%	No	NonTaxable Sublet	

## General Ledger Codes Screen

The General Ledger Codes screen allows you to define general ledger codes used for tracking your income accounts and sales tax rates.

iAutoFocus Version 8 General Ledger Code Setup Screen

When you first open the General Ledger Codes screen, it will be populated with a default list of more than 20 codes. It is strongly recommended that you do not remove items from the default list, as iAutoFocus uses the default list for importing estimates from your estimating system. If you need to add additional codes, add them to the end of the list of default codes where the code and description fields are blank.

At this time, you should go through the list of General Ledger Codes and enter your labor rates for the various labor codes and the tax rate charged for each code. You generally only enter a labor rate for anything with the word "Labor" in the description. This is your standard advertised labor rate and will show on all your forms. Note: This can be changed manually for special jobs if need be.

After entering each labor or tax rate, press the down arrow on your keyboard to save the changes. Be certain to put a sales tax rate on any code name that starts with Taxable regardless of whether tax in your area is calculated on that income type. The labor rates entered are used when hand-writing an estimate in iAutoFocus, and will not override the rate(s) you have set up in your estimating system.

It is recommended that under the QuickBooks Income Name (QB Income Name) column, you combine Rows such as Taxable Parts and Non taxable Parts and call them both “Parts” in that column. Do the same for Taxable Sublet and Non Taxable Sublet and change the QB Income Name to be Sublet for both. Taxable Other and Non-Taxable Other can both be renamed “Other” in the QB Income Name Column. The next column is reserved for Quick Books Cost of Goods Sold (COGS) Name. E.g. If your parts name in QuickBooks cost of goods sold is called Parts Costs, enter that here.

The column heading **Labor** is used to distinguish which income accounts are available for your use in labor costing and payroll to technicians. Just change them to No or Yes to indicate appropriately.

The **Export Accounts** tab, pictured below, allows you to set the name of your state’s tax agency for export to Intuit’s QuickBooks™ accounting software. Users will complete any necessary fields (most will default appropriately). The only field that generally needs to be edited by the user is the “Sales Tax Agency” field to be the name of the Sales Tax Agency in your state.

The “Class” checkbox will allow you to export every category in iAutoFocus as a different income class in QuickBooks. Additionally, the blank field below that option allows multiple shop users to separate shops income by a name given here... generally the name of the city or the street this particular shop is located on.

The industry standard Default (and recommended format) for the field QB Export Format is “Last Name, First Name.

Export Vendor Bills as Items is not commonly used but allows you to get detail information into QuickBooks.

Load Factors: If the user clicks the “Enable” checkbox when an estimate is imported, iAutoFocus will take your determined percentage of the entire estimates labor and move it and into another category of your choosing. E.g. Some shops need to allocate a certain portion of Labor for Car Detail. In that scenario, the user will click on Enable, Name the Line Item Description as “Car Detail” and type in the desired percentage in the Percent field. The user would then need to choose the proper Taxable and/or Non-taxable GL code based on whether Labor is taxable in your state.



Clicking on the Export to QB button will create a standard QuickBooks™ import file containing a list of accounts to be added to the QuickBooks™ chart of accounts. Import this file using QuickBooks™ if you plan on using the QuickBooks™ export functionality of iAutoFocus Version 8.

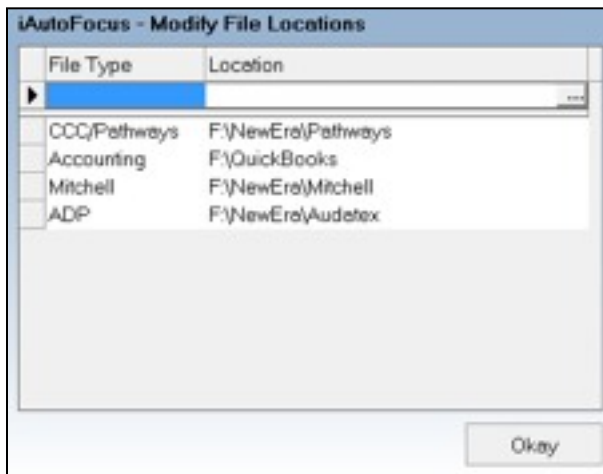
The screenshot shows the 'iAutoFocus - General Ledger Code Setup' dialog box with the 'Export Accounts' tab selected. The dialog is divided into two main sections. The left section contains several input fields for account names: 'Income Account' (NewEra Income), 'Cost of Goods Sold Account' (NewEra COGS), 'Accounts Receivable' (Accounts Receivable), 'Accounts Payable', 'Deposits', 'Sales Tax Agency' (Taxation and Revenue), and 'Class' (with an unchecked checkbox for 'Export Category as Class'). The right section contains a 'QB Export Format' dropdown menu set to 'Last Name, First Name W/O #', an unchecked checkbox for 'Export Vendor Bills as Items', and a 'Load Factors' section with an unchecked 'Enable' checkbox. Below this is a table with two columns: 'Line Item Description' and 'Percent'. The first row shows 'Misc. Supplies' with a value of '4.00%'. Below the table are two dropdown menus for 'Taxable Applied GL Code' and 'Non-Taxable Applied GL Code' (set to 'TP - Taxable Part'). At the bottom right of the dialog is a 'Quickbooks Operations' button. At the bottom of the dialog are three buttons: 'Defaults', 'Export to QB', and 'Okay'.

iAutoFocus Version 8 General Ledger Code/ Export Accounts Screen

## File Locations Screen

The File Locations screen allows you to specify where various files used by iAutoFocus, such as Estimating systems, QuickBooks™ exports, and Paint System files, can be found.

To add a new file location, choose the file type from the drop down list at the top, then type the fully-qualified path, or browse to the location where these files are located using the ellipse (...) button at the right of the location column. To delete a File Location, click the gray box to the left of the file type description, then press the Delete key on your keyboard. Click okay when you are done with this screen to close it.

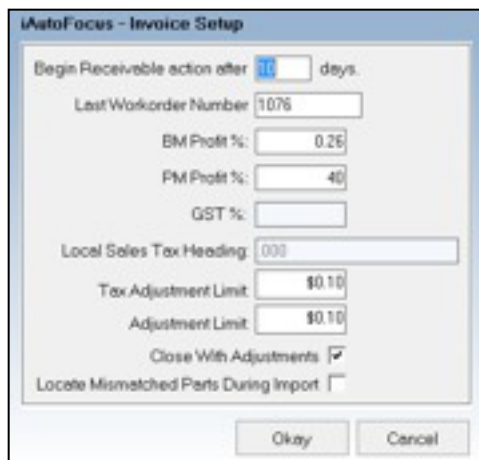


iAutoFocus Version 8 Security/File Locations Screen

Note: This path must match the path set in the application you wish to interface with and you might need to contact that software provider in locating where to set that path in their application. It must have the option to export in the CIECA 2.01 standard. For support, contact NewEra at 877-447-4707.

### Invoice Setup Screen

The Invoice Setup screen allows you to control how invoices are handled in iAutoFocus.



iAutoFocus Invoice Setup Screen

The first field controls how long before open invoices appear in the receivables management screen. Allows you to track how much a customer owes you and it will show on a calendar ## many days after the car leaves. The default is 10 days but can be changed according to your shop needs.

The Last Work Order Number field controls how Work Orders are numbered in iAutoFocus. If you did not select the 'Use Estimating System RO Number' option on the Company Information screen, iAutoFocus will use the next available Work Order Number after this number when authorizing a new Work Order. Most shops using this field will enter 10000 as the first number. If you do not designate a starting number, iAutoFocus will use number 1.

The BM and PM Profit Percent fields allow you to specify the default profit percentage your shop receives on Body Materials and Paint Materials, respectively. It is not necessary to fill either of these fields.

The GST % and Local Sales Tax Heading fields are only enabled in the Canadian release of iAutoFocus.

Tax Adjustment Limits and Adjustment Limit require iAutoFocus to notify you anytime an adjustment over the entered amount occurs. When iAutoFocus imports from the estimating system, if it can't calculate the totals correctly, it will place the difference into an adjustment. This will help the user to determine why the totals differ and will not allow you to close the file unless the adjustment amount is less than the dollar amount entered here.

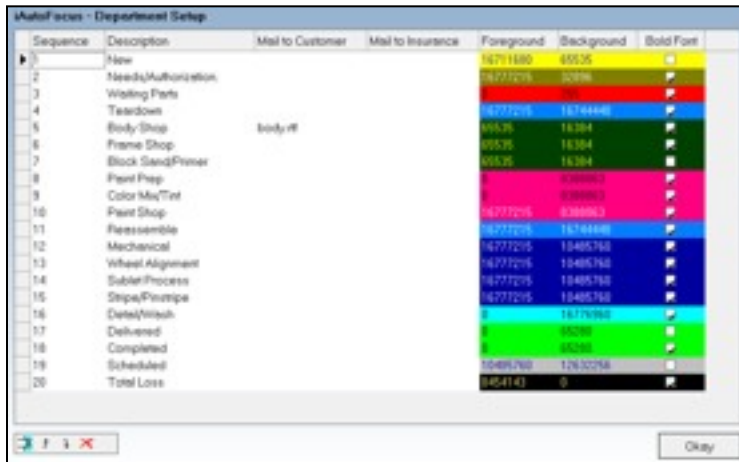
To disregard any amounts entered into the Adjustment fields, check the "Close with Adjustments" option.

Locate Mismatched Parts During Import allows the user if you have received a part on a workorder and the part number changed from the time of the import or wasn't correct. Once you re-import that estimate and now that part number is located, it can match up those mismatches. A box will appear and ask the user if this is the part they are looking for? Yes or No.

### **Departments Screen**

The Department Setup screen allows you to specify departments for classifying work orders within your shop in order of the work flow. Individual departments can be set up for both physical locations within your shop, such as Teardown, Refinishing, and Storage, and for vehicle states, such as Completed, Delivered and Total Loss.

The Department field can be used on the main screen to filter work orders, providing a clearer picture of your shop.



iAutoFocus Department Setup Screen



The default setup provides a list of commonly used department names and corresponding colors. You can add, modify, and delete departments based on your shop's life cycle.

NewEra Software recommends that you always have department sequence 1 set to something like New Arrivals, New, or Unassigned. Department sequence 1 is the default department new work orders are placed into when they are first imported into iAutoFocus. Doing this insures that all new work orders are segregated from actual work in progress, until you are ready to move them into the shop.

Departments should generally be ordered by sequence according to the order they generally follow through your shop. For example, Teardown should come before Repair. Items such as Storage and Totals loss should be located towards the end. This facilitates ease in locating departments as they are ordered by their sequence number in department lists. Items can be put in order using the arrow icons at the lower left of the screen.

For shops that don't want to over complicate themselves, we recommend the following department headings: Unassigned, Teardown, Frame, Body, Paint, Re-Assembly, Sublet, Mechanical, Detail, Total Loss, Storage, and Delivered.

To change a department name, simply click on the field and type in the changes. If you would like to add a department between two departments, click on the department below where you want your department added, then click the 'Add Depart-

ment' icon and change the name accordingly. To change the position or sequence of a department, click on the department and use the 'Arrow'  icons to move the department up or down to your desired location. To completely remove a department, highlight the department and click on the 'Delete'  icon.

Note: Once you have appropriately set up your departments, keep in mind that any changes will affect all current jobs. It is recommended that you never delete sequence number 1 or the last department in your list. Deleting those sequences can cause jobs to be moved into the wrong department. To prevent this from happening, use the method in the following example: If you need to delete the first sequence, we recommend instead that you change the name of sequence 1 to match sequence 2 and then delete sequence 2.

The columns entitled 'Mail to Customer' and 'Mail to Insurance' will allow you to browse your letter files (created in the Letters & Labels section under Management on the left navigation pane in iAutoFocus) by clicking in the appropriate field and select specific letters to be automatically emailed to customers or insurance companies when the cars change departments.

The Foreground and Background color columns have already been defaulted for you. These colors will help identify what departments the cars are in. Although not recommended, colors can be changed by clicking on the appropriate field and selecting the colors of your choice.

### **PO Setup (Purchase Orders) Screen**

The PO Setup screen allows you to specify how Purchase Orders are numbered in the iAutoFocus system.

**iAutoFocus - PO Management Setup**

Use the following PO Number prefix:

- None
- First 3 letters of the Contact Name
- Custom ABC

Use the following PO Number assignment:

- None - Manual PO Number assignment
- Automatically increment PO Numbers
- Use Workorder Number as PO Number

Next PO Number: 1001

Duplicate PO Numbers will be appended with a sequential suffix (-1, -2, etc.)

Okay Cancel

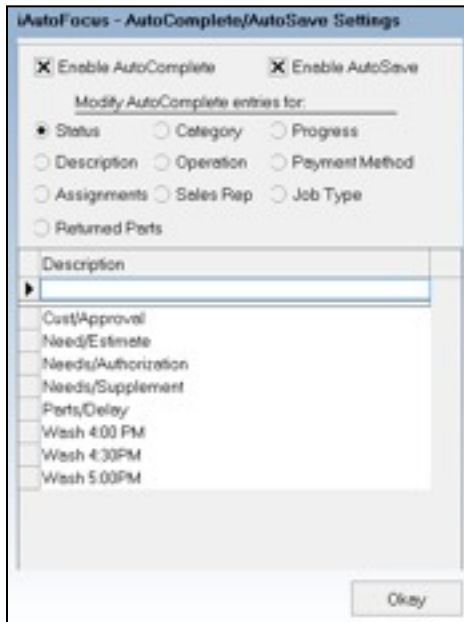
iAutoFocus PO Management Setup Screen

The first panel of options allows you to define a standard prefix applied for Purchase Orders. The options allow the PO Number to either be prefixed with the first three letters of the Vendor's name, or to be prefixed with a set of predetermined letters, such as the initials of your shop.

The second panel allows you to control how the main PO number is generated. You can either choose sequential PO Numbers, or to use the Work Order Number as the PO Number. When using the Work Order Number as the PO Number, iAutoFocus will automatically append a -1, -2, e.g. as needed when there is more than one PO. The default is to Use the Workorder Number as the PO number and is also the recommended format.

### **AutoComplete/AutoSave Screen**

The AutoComplete/Auto-Save Settings screen allows you to modify various lookup lists used by iAutoFocus, as well as to set whether iAutoFocus will automatically store new entries in these lists.



iAutoFocus AutoComplete/AutoSave Screen

The **Enable Auto-Complete** option sets iAutoFocus to automatically complete your entries as you type them where these lists are used.

The **Enable AutoSave** option instructs iAutoFocus to save new entries that do not exist in the various lists. Once you have been using iAutoFocus for awhile and you have a good clean list to work from, it is suggested to turn AutoSave 'off' to prohibit users from adding unnecessarily to the list and to only use the available options.

The following lists are tracked in iAutoFocus:

**Status** – A list of codes used to categorize Work Orders. This field is frequently used to track customer-service related statuses (e.g., In Progress, Needs Parts, Needs Supplement, Needs Authorization, Needs Rental, etc.) Generally, if everything is going well with the work order, the vehicle might not have any status at all. However, feel free to use this field however you see fit in iAutoFocus.

**Category** – This field is often used to track the referral type of a Work Order, such as which insurance agent assigned the job, customer-pay job, walk-ins, advertising, customer referrals, etc. It is also useful to separate your insurance work by Assignment versus walk-in or other method. However, feel free to use this field however you see fit in iAutoFocus.

**Progress** – This list contains pre-defined statuses used to indicate the progress of a Work Order in a specific Department. This list is used in conjunction with the list of Departments created on the Department Setup screen. It is commonly filled with items such as Not Started, In Progress, Completed, and Awaiting Parts. Progress can also be used to track sublet items such as Electrical, Detail, Mechanical, Pin striping, or PDR.

**Description** – This list contains line item descriptions entered on the Line Item screen. Generally, it is best to leave this list empty, turn on AutoSave, and allow lines to be saved from the Line Item screen as they are typed.

**Operation** – This list contains operations performed on a line, (e.g, Repair, Remove or R&I). If you type your own estimates into iAutoFocus it is beneficial to fill this list with common Operations.

**Payment Method** – This shows the payment types accepted at your place of business such as Cash, Check, MasterCard, Visa, etc.

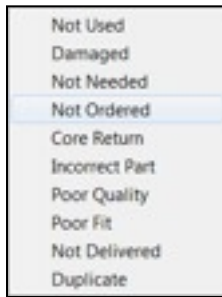
**Assignments** – This area is for assigning different tasks to employees on specific work orders. Tasks commonly used are Paper Work, Thank You, Clean-up, Detail, and the like.

**Sales Rep** – The primary sales rep or estimator for a Work Order. If you import estimates from an estimating system, this field is automatically populated for you, otherwise, you should fill it with a list of Service Reps/Estimators in your shop.

**Job Type** – This category determines what size the job is. Common descriptions in this section are Tow In, Small, Medium, Heavy, and Total Loss.

**Returned Parts** – This section allows the user to add to a list of already determined reasons for returning parts within Parts Management. The permanent list already created by NewEra (shown below) cannot be changed however, this features allows the user the flexibility to add more based on shop needs.

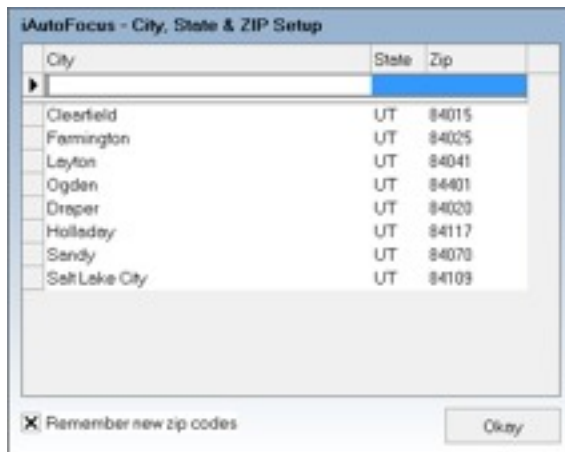




iAutoFocus Returned Parts Reasons

## Zip Codes Screen

The Zip Code screen allows you to add, edit or modify the list of zip codes in iAutoFocus. By pre-defining the list of zip-codes, you insure that Cities and States are spelled correctly, as well as reducing the amount of information that needs to be typed when entering a work order, customer or vendor in iAutoFocus. Whether a zip code exists in this list or not does not affect your ability to enter it into iAutoFocus.



iAutoFocus Zip Codes Screen

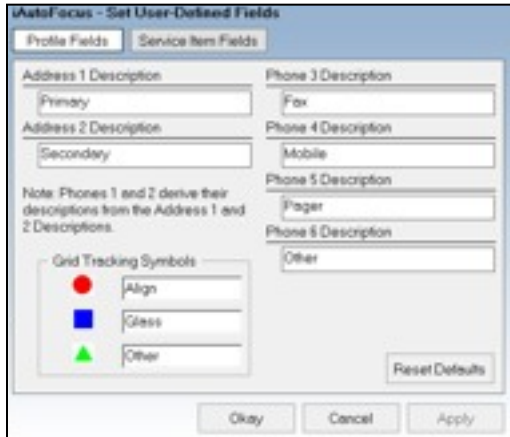
If your shop generally services vehicles from a small number of zip codes, you may wish to pre-define the list of cities, states and zip codes here.

If there are many zip codes in your area, you may prefer to enable the **Remember New Zip Codes**. This will instruct iAutoFocus to remember all City, State and Zip code combinations entered.

To enter a new zip code, simply click in the first field, enter the information, and click 'Okay'.

## User-Defined Fields Screen

iAutoFocus has already completed this part of the setup for you. The User-Defined Fields screen has two tabs: 1) Profile Fields 2) Service Item Fields. This screen allows you to set custom titles for various pieces of information on the Contact screen.



iAutoFocus User-Defined Fields Screen

**Note:** If you are using CIECA, you must use these defaults!

It is not necessary to modify these labels unless you are installing a customized version of the iAutoFocus. If changes are made accidentally, click reset defaults to populate these labels on the 'Profile Fields' tab and do the same on the tab called 'Service Item Fields' then click OK to exit.

Also on the Profile tab are Grid Tracking Symbols. You will see a circle, a rectangle, and a triangle. Each of those shapes can either be red (Needs to be Done), Blue (Being Done), or Green (Completed). These fields can be changed however generally these are used to track sublet items such as alignments, glass installations, and other.

## Import Translation Screen

The Import Translation screen allows you to setup translations which will move a Line Item from one income account to another.

Seq	Search String	Convert To Code
4	Car Cover/Refinishing	2RL3
5	Car Cover/Refinish Jamb	2RL3
8	Sand/Buffer	2RL3
11	%Hazardous Waste%	1EPC1
12	Flex Additive	1PM1
14	Disconnect/Reconnect Battery	2ML2
15	Corrosion%	1PM1
17	Undercoating	1PM1
18	Body Materials	1PM1

Enter the description string to search for and the GL Code to convert item to. Enter the GL Code in the format #GL#, where the first # is the position of the code to convert from, GL is the code to convert to, and the second # is the position to convert to. For example, enter 'Storage' in the search string and '1ST1' in the convert field to assign storage to the first item in the line. You can use wildcard characters in the search string. Use '%' to match any number of characters and '\_' to match a single character.

Include 'Part Type' in translation

Import Export Okay

iAutoFocus Import Translation Screen

To add a new item to translate, scroll to the end of the list and look for an empty field. Click in the field and enter the words you want iAutoFocus to search for. Using the wildcard symbol "%" either before or after your description will ask the system to search for items that contain your description before or after other words.

In the 'Convert to Code' column, use the following format to tell iAutoFocus how to translate line items: Line number you want to convert from, followed by the GL Code, followed by the line number you want to convert to.

The line descriptions are as follows:

Line 1 refers to Parts: Parts, Sublet, Towing, Materials

Line 2 refers to Labor: All labor except for refinish labor such as; Body, Frame, Mechanical, Detail, etc.

Line 3 refers to Refinish Labor: Refinish/Paint Labor Time

Example 1: Corrosion% 1PM1 tells iAutoFocus to take information from the Parts Line with the word Corrosion and anything after that word, give it a code of PM for Paint Materials, and keep it on Line 1.

Example 2: Car Cover/Refinish Jams 2RL3. If car covers are generally part of your paint department but the insurance company placed it under body labor, you can request iAutoFocus look for Car Cover/Refinish Jam on line 2 for Labor, give it a code of RL for Refinish Labor, and move it to Line 3 for Refinish Time.

Example 3: %Hazardous Waste% 1EPC1 will look for anything on Line 1 for Parts with the words Hazardous Waste in them, give it the GL Code of EPC, and leave it on the Parts line.

Example 4: Towing% 1TW1. This format searches for the word Towing on Line 1 for Parts, gives it a separate GL tracking code of TW for Towing, and leaves it on Line 1. You could use this if an insurance company will only pay for towing when coded as a Taxable Otherwise and instruct iAutoFocus to recode towing into a separate Towing account so that you can track towing charges in your accounting system.

Commonly translated items include: Hazardous Waste, Corrosion Protection, Towing, and Car Cover.

The checkbox at the bottom of the screen entitled 'Include Part Type in Translation' will double check and run import translation of the part types as well. This allows you to take things such as repair or new parts and move them to codes specific for your shop.

If you have multiple shops and have your Import Translation already set up at one location, you can also use the 'Export' key to export the information to a file, and then open up the second location and use the Import key to import the file. This will save time and ensure consistency between shops.

### **Scheduling Screen**

The Scheduling Screen has four tabs and is used to determine Load Hours, Work Weeks, Holidays, and Vacations. Portions of the four tabs are shown below.

The First tab for **Load Hours** allows you to enter how many hours of productivity you have available in different departments of your shop. In the first field for Body Load, you just take the number of body technicians you have and multiply that by the number of productive hours per day. In the example above, there are 4 technicians and each work 7 productive hours per

day. 4 multiplied by 7 equals 28 body load hours per day. The system then calculates a weekly total of 140 body load hours available per week. You would do the same for Refinish Load and then enter how many cars per week your shop can handle in Car Load.

The scheduling threshold allows you to enter the percent (in increments of 10) at which you want to be notified you are approaching your preferred load capacity. The percent you enter here will cause the scheduler to turn “green” at that level. Other colors in the scheduler are blue (low capacity) and red (approaching maximum capacity).

Once you have entered the appropriate information, you can then decide whether to use the checkboxes or not to have the scheduler calculate recommended scheduled IN and OUT dates based on hours available and capacity.



iAutoFocus Scheduling – Load Hours Screen

The **Work Week** is defined by clicking on the typical days you are open (shown below) and then entering how many hours you want factored into your daily job flow, whether or not you want refinish hours included in the job flow, how many months of scheduler history you want to retain, and how many months into the future you want available.



iAutoFocus Scheduling Screen – Work Week Tab

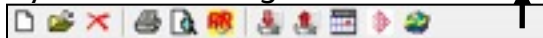
The **Holiday** tab allows you to set up holidays by simply entering the name of the holiday, the date, the number of hours and then click ‘Add’.

iAutoFocus Scheduling Screen – Holiday Tab

The **Vacation** tab allows you to enter the employees name, vacation start and end dates, department, and how many hours to pull from the scheduler. Once all information has been entered, click the 'Add' button. To remove any vacation, simply highlight the item and click 'Delete'. Doing this regularly will allow you to pre-plan any shortages in staff and automatically adjust the scheduler accordingly.

iAutoFocus Scheduling Screen – Vacation Tab

Once all entries have been made, you can access the scheduler by clicking on the calendar icon



on the main toolbar.

The Scheduler displays the current month and day then depending on information previously entered during the setup, you can



## iAutoFocus Scheduler

The search fields at the top of the scheduler allow you to enter criteria for locating a particular Work Order, Customer, Vehicle Description, Body Style, Paint Color, or even Insurance Company.



The arrows to the right of the scheduler will expand or condense the size of the scheduler and the information that is shown.

When you click on a specific date in the scheduler, all the jobs being worked on that day will populate in the portions below the calendar indicating the job information and hours associated with that date.

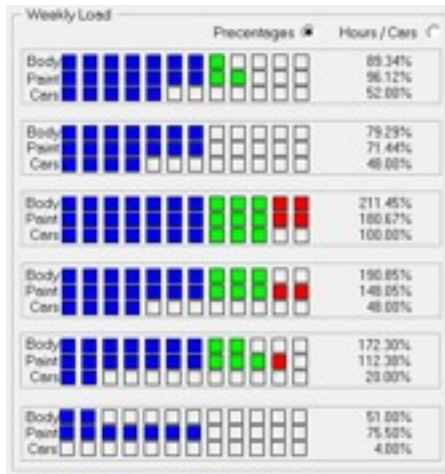
WO.#	Customer	Job Type	Phone	Vehicle Description	Body	Paint	Insurance
5385	GROEDER, SUSAN	Electrical		95 MERC VILLAGE	30.5	15.5	Akstate Ins
5380	SCHMECHTEN, ROCHA	Wheels/Tires		89 CHEV CHEVELL	18.2	13.8	State Farm
5375	MATTERN, JOHN	Mechanical		97 JEEP WRANGL	32.8	14.9	Safety Insu
5378	STONE, TERRY		(801) 776-1864	82 CHRY VOYAGE	9.9	8.0	STATE PA

Hour Totals	Body-Lbr	Refinish	Frame	Mech	Strut	Glass	Other	Cars	Total
Daily	75.5	44.2	8.0	19.2	8.8	8.8	1.8	4	\$13,153.31
Not Scheduled	14.3	11.3	8.0	1.1	8.8	8.8	8.8	1	\$2,683.66
Work In Progress	493.0	388.8	30.5	38.5	8.8	4.5	17.3	31	\$76,863.30

iAutoFocus Scheduler - Lower Portions

The Weekly Load Section of the Scheduler shows either Percentages or Hours/Cars referring to the load capacity of Body, Paint, or Cars. Based on the percentage entered during setup, the colored boxes will change from blue to green and eventually red when you are approaching maximum capacity.



iAutoFocus Scheduler - Weekly Load Portion



# iAutoFocus Overview

This Section will help provide an overview of iAutoFocus screens and options. Reviewing this information will provide a solid base from which to build on. When you are ready for more detailed information, please refer to the “Using iAutoFocus” and “Using iAutoFocus Advance Features” sections of this manual.

## Left Navigation Bar Overview

Along the left hand side of the iAutoFocus screen is the navigation bar, which allows you to interact with the various functions of the program. This section provides a brief overview of the underlined headings on the left navigation bar.

The Left Navigation Bar is separated into 9 color coded groups with sub-groups: **Blue** headings are for all your jobs and estimates (Pending Work, Work in Progress and Completed Work). **Green** headings are reserved for management functions (Reports, Parts Management, Labor Management, Management, and Contacts). The **Red** heading is solely for importing and exporting from iAutoFocus (Utilities).

To the left of most sub-groups, you will notice a number that corresponds with the number of files or items located in that section. This feature gives you an idea of what is in a section without even clicking on it.

When you first import a estimate into iAutoFocus, depending on the options chosen, the file will be located in either Not Authorized, All Work in Progress, or All Completed Work. Once you locate the file, changes you make to it will cause it to automatically move to different sub-groups under the **Blue** sections on the Left Navigation Bar.

E.g. when a file is located in All Work in Progress, adding a **Scheduled In** date will cause it to move to **Future Arrivals** or **Arriving Today**. From those sub-groups, when you change or add information, you will notice the file moving to other appropriate sub-groups.

Remember the first three **Blue** groups, Pending Work, Work in Progress, and Completed Work, allow you to work with the jobs

and estimates in your shop. Those types of files will always be located there.

### **Pending Work**

Click on **Not Authorized** on the navigation bar to view pending work. Pending work is any estimate that has been written or assigned to your shop by an insurance company or adjuster, but has not yet been authorized by you. Until the estimate is authorized by you, it will not receive a work order number.

### **Work In Progress**

This is where files that have been authorized but have not yet been delivered are displayed. Work in Progress is separated into numerous areas for your convenience in working with the files but ALL work in progress is always displayed when you click on the **All Work in Progress** heading on the left navigation bar.

Other dates on the actual work order that move work in progress into subsections are: Scheduled In, Rental Start, Work Started, Work Completed, and Scheduled Out. Scheduled In and Out dates are recommended that you use. Rental Start, Work Started, and Work Completed are optional dates for your convenience and do not have to be used in the system.

- All Work In Progress – These files have been assigned a work order number and have an authorized date set and do not have a **Delivered** date on the record.
- Authorized not Scheduled – These files have been authorized but do not have a **Scheduled In** date.
- Future Arrivals – Once a file have been given a **Scheduled In** date for greater than today's date, they will be found here.
- Arriving Today – Any file with a Scheduled In today matching today's date will be located here.
- Missed Arrivals – If a file passes its **Scheduled In** date without an **Arrival** date being entered, the file will have missed its arrival date and will be located here.
- Arrived – Once a file has been given an **Arrival** date, it will be found here.
- Rentals Out – Once a date has been selected in the Rent Start date, files will be in this category.

- Work Started – Once actual work begins on a vehicle, users will select a Work Start date and files will be located here.
- Work Completed – Once all work has been completed on a file, users will select a **Work Completed** date and files will move here.
- Future Deliveries – Once a file has been given a **Scheduled Out** date later than today's date, it will show here.
- Delivering Today – If a file's **Schedule Out** date matches today's date, it will show here.
- Past Due Deliveries – Any file where the **Scheduled Out** date has passed and **Delivered** date have not been entered (must open the workorder, click on 'Date Info' radio button in the top right section of the work order, check on the **Delivered** Box which is defaulted to today's date, and click Okay)..

### **Completed Work**

These are all the files that have been completed or have a **Work Completed** date on the file.

- All Completed Work – Displays job that have been completed by selected a **Work Completed** date. All the files located in this section have also been separated into additional areas for your convenience.
- Delivered Not Billed – Files that have been marked as **Delivered** (in the Date Info section of the work order) but have not been marked as **Billed** (also in the Date Info section of the work order).
- Billed Invoices – Files that have been marked as **Billed** but have a balance owing in the **Bal. Due** column will be displayed here.
- Closed Invoices – Files that have been **Billed** and **Bal. Due** Column shows 0.00 (or paid in full) will be in this section.

Note: Until the file is marked as Billed it will not display in any of your financial reports. You would want to mark a file as Billed when you have finalized the sales price of the work done regardless of where or not it is paid.

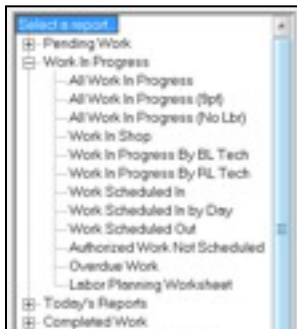
## Reports

This section provides a wealth of information using the data in iAutoFocus! Simply click on the heading **System Reports**. Doing so will bring up a window with numerous categories of reports (shown below).



iAutoFocus System Reports Screen

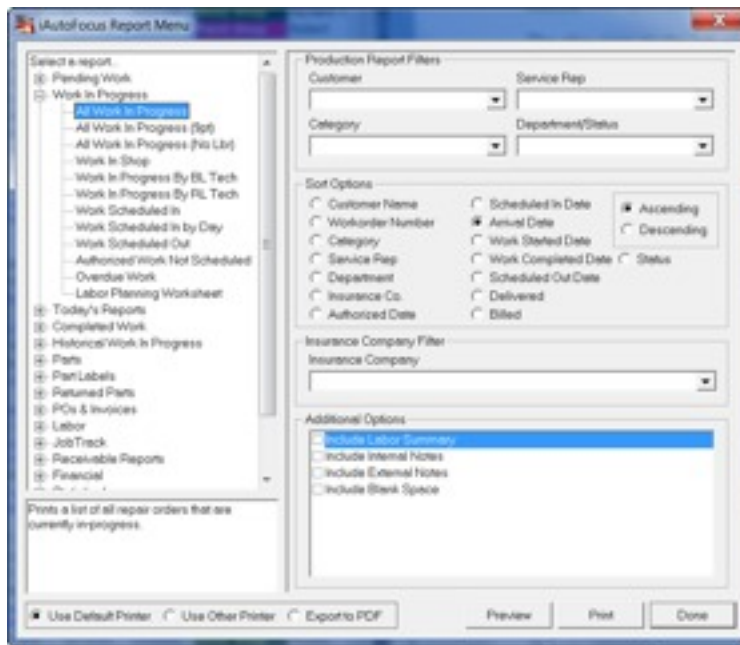
The plus signs to the left of each report category will expand when clicked and provide a list of reports available for that category (shown below).



iAutoFocus System Reports Screen

Choosing the desired report will populate the right side of the reports screen with options and filters to fine-tune your report. Once you have completed your options, you can then **Preview**, **Export**, or **Print** your report.

NewEra recommends you spend some time in the **System Reports** Screen to familiarize yourself with the many report options and incorporate ones most fitting to your shop strategy.



iAutoFocus System Reports Screen

## Parts Management

The **Parts Management** section of the Left Navigation Bar is reserved for all functions regarding parts. This is where you maintain **Purchase Orders**, **Vendor Invoices**, inventory, and **Returns**. You can easily view parts that need to be ordered in **Order Parts**, see parts that have already been ordered in **All Parts Ordered**, and all parts that arrived in **All Parts In**. More detailed information on how to use Parts Management is provided later in this document.

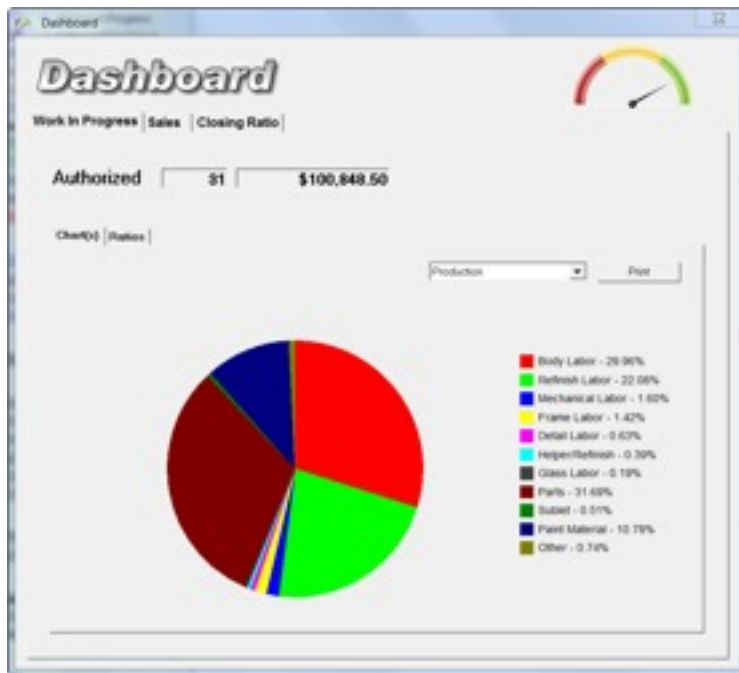
## Labor Management

**Labor Costing** provides an area to assign employees to jobs, flag hours, and keep track of payroll. Additionally, the **Time Clock** feature is provided for employees to track time on jobs, break and lunch time, vacation and holidays. More information on how to use Labor Costing and the Time Clock is provided later in this document.

## Management

The Management heading on the Left Navigation Bar provides three options to choose from. The **Receivables** heading provides a management screen with all current and aging receivables. Using this screen provides you with all the tools you

need to collect monies owed by customers. The **Dashboard** heading displays a pie chart for your Work in Progress. Different charts can be displayed by changing the options on the screen.




iAutoFocus Dashboard Screen

The **Letters and Labels** screen displays options to design and store commonly used letters to email or mail to customers and insurance companies. Additionally, the ability to print envelope labels help keep you efficient and organized.

## Contacts

This is where you would enter information for repetitive use. Vendors, Insurance Companies, Employees, Dealer Accounts and Business Contacts are the types of contacts you would add here.

To add a new contact click on **All Contacts** on the left side then click on the **Add New** icon  on the upper left side of the screen. The picture for the Add New icon looks like a blank sheet of paper.

On the upper portion of the screen select the type of contact that you are adding (**Business, Individual, Insurance, Vendor, Employee, or Personal**) and then enter the pertinent information for that contact record.

iAutoFocus New Contact Screen

Note: When entering vendors you will notice an account info icon towards the right of the screen below the id number where you can enter account terms used when exporting to accounting interfaces before clicking on the account info tab you will need to save the contact record by clicking on apply at the lower right.

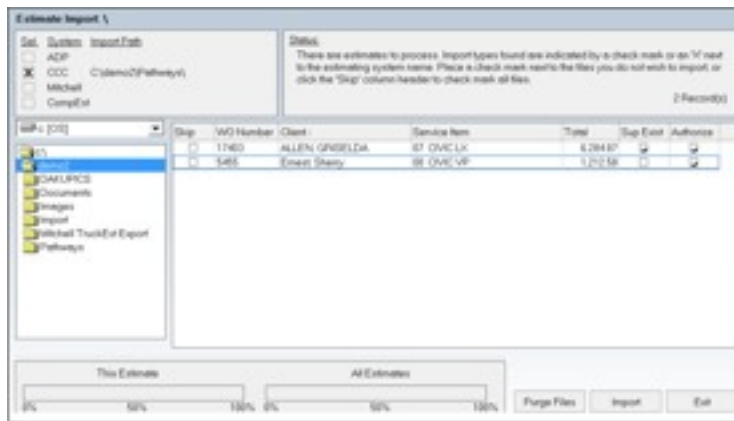
When entering an employee there is a display field which defaults to the first name but you can choose to make that the initials or employee id # if you would prefer. This field is used for displaying the technician on the main grid and the work in progress reports.

When you have completed entering information for the contact record press Apply at the lower right to save or Okay at the lower right to save and exit or the Add new icon on this screen at the upper left to save and add another contact of the same type.

## Utilities

The Utilities heading list two options to choose from: **Import** and **Export**. You will use The Import function to import estimate into iAutoFocus Collision Management Software from any estimating software you currently use.

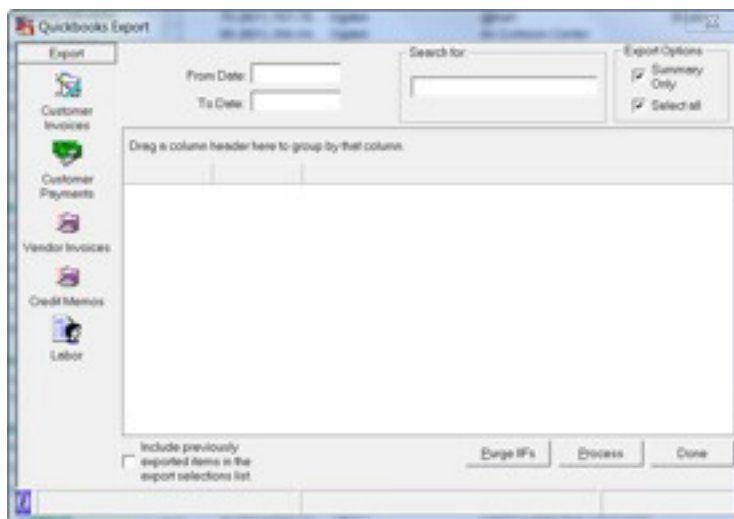
Note: Importing estimates in iAutoFocus is discussed in greater detail in the Importing Estimates section of this manual.



iAutoFocus Import Screen

Exporting data from iAutoFocus into QuickBooks is handled by clicking on the Export option.

Note: Exporting to QuickBooks is discussed in greater detail in the QuickBooks section of this manual.



iAutoFocus Export Screen



# Using iAutoFocus

This Section will help you get started in using iAutoFocus for managing jobs in your shop. It covers the basic steps you will need for accomplishing necessary tasks on a day-to-day basis. Once you are familiar with the functions described in this section, it will be easier to pick up on the advanced features of iAutoFocus.

## Launching iAutoFocus

You can start iAutoFocus Version 8 by either double-clicking on the iAutoFocus icon on the desktop,



or by clicking on iAutoFocus on your program menu.



You will be prompted to enter a user name and password, as pictured below.

iAutoFocus Version 8 Login Screen.

After entering your username and password, click on 'Okay' to login to iAutoFocus. Please note that username's and passwords are NOT case-sensitive.

## Importing Estimates

With iAutoFocus open there is a tool bar menu on the left side. The items are color coded in sections and if you scroll down and locate the "red" utilities section you will find options that deal with organizing, importing, and exporting data files. You can click on Import to find EMS files that have been exported from an estimating system.

Remember that you will not be able to import a file until you have successfully set up your **File Locations** (as explained in the **iAutoFocus Setup** section of this document) and exported an EMS file from an estimating system using the CIECA standard.

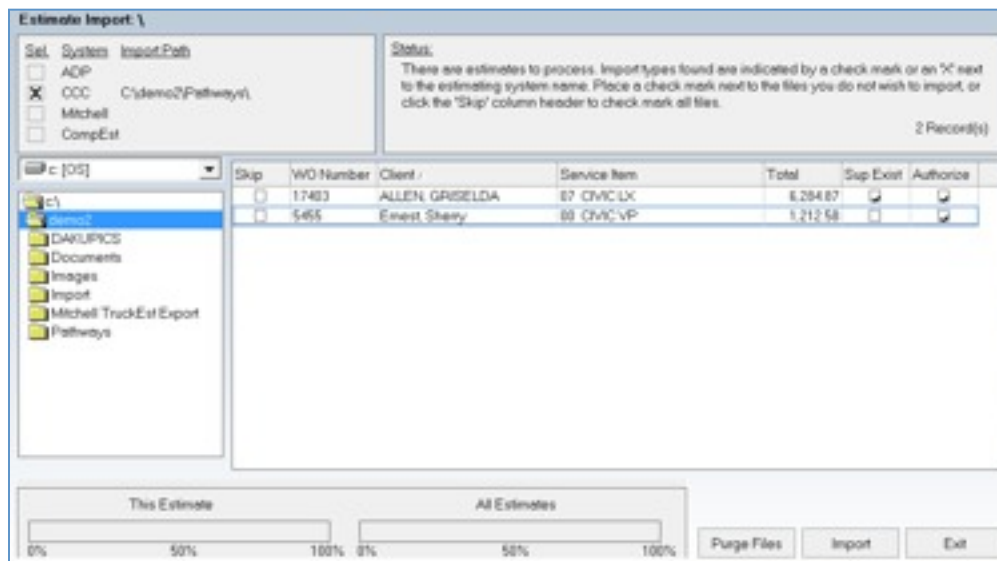
It is also useful to note that up along the top toolbar in the program is an icon that looks the same as this icon on the left toolbar. That means you could also click that icon on the top toolbar to import estimates without having to scroll down the left toolbar.

To Import Estimates:  
Click **Import Estimates**,  
authorize any estimates,  
Click on **Import**.

Note: Before importing  
Discard any unwanted

## iAutoFocus Main Grid

When the import screen opens it should automatically locate any available estimates to import. If you do not see any estimates listed for import but feel like you have exported a file you can use browse to the drive and correct folder using the window located at the left center of the Estimate Import screen. If you are successful in finding an estimate this way then you will need to determine why your file locations window does not correctly find the files needed.



iAutoFocus Import Estimate Screen

Once you have correctly identified files to import you may click on **Import** at the lower right to begin importing estimates. Some new customers will discover hundreds of import files that have been created over years of using their estimating system when first viewing the import screen. You will want to choose **Purge** files rather than import otherwise you will import many unnecessary files that will need to be deleted one by one later. Purge

files will delete the file to be imported without importing it into the system. It will not delete the file from the estimating system. It will only delete the EMS Export file that had been created.

Another option on this screen is a check the box located on the left side of the file to be imported titled **Skip**. This will make it so when checked the estimate will be skipped and not imported into the system. It will remain available to import when you return to the estimate import screen. You are not able to highlight a single line to import. When you click import it will import all estimates listed with the exception of items marked skip.

You also have the option to manually type the work order number to an estimate on this screen. If you do not already see a work order number on the estimate but know that you have assigned one in the estimating system then go back and check the option in Setup, Company Information, Use Estimating System RO#s, and then open the Estimate Import window again.

If a Supplement exists on an estimate, the **Sup Exist** Checkbox will be checked

Also if you have a file that you want to import directly into Work in Progress rather than into Pending Work, make sure that the **Authorized** Check at the end of the line is checked before clicking import. When you have clicked import it will import the file or files into the system.

### **Possible Errors**

If when importing the file, iAutoFocus is not able to correctly match the total sent in the file you will receive an informative message indicating this to you. You might receive this message if you have not correctly set your sales tax rates and taxable items in Setup, General Ledger Codes.

You might also receive this message if the taxable calculation in iAutoFocus does not match that from the Estimating System. It is wise when receiving this message to write down the total the file should be then you will be able to open the file and determine where the discrepancy is and know when you have corrected the problem.

When you receive this informative message you might note that you need to click OK to continue and in some cases your mouse

pointer might still look like it is busy, but that is not the case and you can click OK once you have read the message to continue with Importing Estimates.

Close the Estimate Import Screen by clicking Exit located at the lower right and then locate the file you have imported in the appropriate place either Pending Work or Work in Progress. Items imported with the Authorized box checked will go into Work in Progress and items imported without the box checked will be imported into Pending Work.

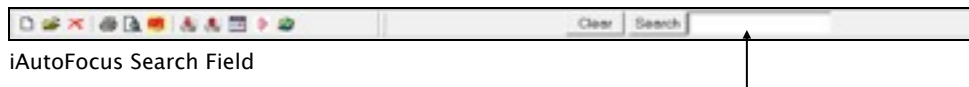
It is important to note that if you have any problems importing estimates or having your numbers balance; this is usually an indication of not having a correct setup in either iAutoFocus or your estimating system. Due to the complex nature of importing estimates and the need to have the files balance, you might need to be in contact with Technical Support until you have achieved a proper setup, and are aware of any known anomalies in the import process.

## Work In Progress

### File Search

When you import a file into iAutoFocus, the file will be located in one of three places: **Not Authorized** (no auth date), **All Work in Progress** (have an authorized date), or **All Completed Work** (have an Authorized date AND a Delivered Date).

If you are unable to locate a particular file in one of those 3 places, you can use the **Search** box on the iAutoFocus toolbar to assist you. To locate a file and using the search feature, click on either Not Authorized, All Work in Progress, or All Completed Work from the Left Navigation Bar. Then type a key word into the Search box on the toolbar at the **top of the screen** (shown below).

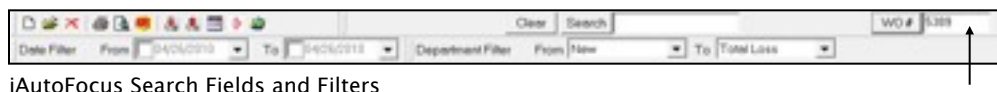


E.g. Users could enter a word like “chev”. iAutoFocus will search for files that include the letters “chev” in the file such as Chevy or Chevrolet. Users could also enter letters such as “Will”. iAut-

iFocus will search for first and last names that begin with those letters and return files such as William, Williams, or Willy.

You can also look for a specific work order number by clicking on either Not Authorized, All Work in Progress, or All Completed Work from the Left Navigation Bar. Then enter a work order number in the Search box and iAutoFocus will return results based on that number.

If you do not know which department the work order is in, you can type the work order number in the WO # Field. iAutoFocus will search the entire database for that number and return any matching results.



iAutoFocus Search Fields and Filters

To refine a search, you can use **Date** and/or **Department** filters on the toolbar below the search box.



iAutoFocus Search Fields and Filters

By choosing a **From** and **To** date on the Date Filter, you can narrow your search of a file based on the Authorized dates. Additionally, if you have an idea of where your file might be in relation to your shop's life-cycle, you can narrow the search by the department it is in. Simply choose appropriate departments from the **From** and a **To** pick lists in the Department Filter and iAutoFocus will return results of based only on those departments the ones between.

### Custom View

Define multiple views for different users or circumstances by going to View... Current View... Define Views... type in a name and save view under that name. Thereafter, when headings and columns are rearranged you simply have to go to View ... Current View and Update Current View, to save changes. A view defined for Work In Progress does not apply to Completed work or Billed Invoices. Each can have a unique arrangement.

Headings can be re-arranged by dragging and dropping the column heading where you want. To save changes, click on View, Current View, and Update Cur-

WO #	Customer	Vehicle	Department	Sched. Dat	Department	Svc. Rep.
1009	GROLLER JR, MEL	97 DODGE...	104		Completed	
1057	KOEHLER, NANCY	94 PLYM GRAND VOYA...			Body Shop	Robert
1060	BILLY, MARTHA	04 CHEV BLRLA 4D SED			Body Shop	Richard Y...
1065	ERWIN, DALE	99 FORD RANGER 4X4 ...	04/29/2010		Paint Shop	Robert
1054	RIGO &, JOHN	94 TOYO CAMRY LE 4D...	06/07/2010		Scheduled	Robert
1055	TURNER, JOANNE	02 TOYO ECHO 2D CPE	05/03/2010		Scheduled	Richard Y...
1046	SANTEE, SAMUEL	85 FORD BRONCO 4X4 ...	04/05/2010		Scheduled	Richard Y...
1053	NESTER, DALE	00 FORD FOCUS 2X3 3...	05/03/2010		Scheduled	Robert
1061	SCHWARTZ, LORI	02 CHRY TOWN & COU...	05/03/2010 04/09/2010		Roofing Parts	Robert
1044	MARC'S AUTO	85 FORD GALAXIE CON...	05/19/2010		Scheduled	Robert
1036	BORDA, RANDY	92 CHEV BERETTA GT 2D	05/19/2010		Color Match	Robert
1051	COSTENBADER, W...	01 NISS XTERRA 4X4 S...	05/19/2010 04/09/2010		Paint Prep	Robert
5338	JONES, KEVIN	94 FORD ESCORT LX HI...	05/17/2010		Total Loss	Robert
Rich- 05/23/2009 - 11:12 AM Called in supplement on hotline						
Rich- 05/23/2009 - 12:06 AM Adjuster was here, determined the car would be totaled and they are only Charge Storage, verify rental						
1078	JONES, ANDREA	96 PONT SUNFIRE SE 2...	05/19/2010 05/09/2010		New	
5358	GRABERRITZ, LEO	99 DODG DAKOTA 4X4 ...	05/19/2010 06/11/2010		Paint Shop	Richard Y...

iAutoFocus Main Grid - Custom Views

## Work Order

When you double-click on a file in iAutoFocus, another window will pop-up and display the work order. The work order is separated into five sections by tabs along the top: General, Insurance, Line Items, Totals, and Payments.

### General Tab

The customer information and vehicle information has already been populated from the estimate. You can enter more information or edit fields such as email addresses and phone numbers. On the top-right of the screen, the work order Tracking Info section, you can use the **Category** drop-down to select or enter how this job was referred to your shop. You can also

change the **Status, Department, Service Rep, or Progress** (related to the Department) of the job right from this screen.

The screenshot shows the 'General' tab of the iAutoFocus Work Order screen. It includes sections for Customer Information (Title, Company, Address, City, State, Zip, Phone, Fax, Email), Vehicle Information (Year, Make, Model, Style, VIN, Plate, Mileage, Out, Engine, # Tones, # Stages, Color, Paint, Trim, Condition), and Work Order details (WO #, PO #, Category, Status, Dept, Progress, Subst). A summary table displays: To Shop: 218, To Go: 204, Billed: 294. The Workorder Total is \$1,388.00. There are 'Ok' and 'Cancel' buttons at the bottom.

iAutoFocus Work Order Screen - General Tab

The colored boxes help you identify where the vehicle is currently in relation to the dates you entered on the Date Info section defined below.

If you click on the **Date Info** radio button, important dates will appear allowing you to check-off and modify crucial information relating to this estimate/job only.

This screenshot shows the 'Date Info' section of the iAutoFocus Work Order screen. The 'Date Info' radio button is circled in red. The section contains a grid of date fields for various stages: Estimate Written (9/4/2009), Assigned (4/26/2010), Inspected (4/26/2010), Authorized (9/4/2009), Scheduled In (9/21/2009), Arrived at Shop (9/21/2009), Rental Start (10/5/2009), Work Started (4/26/2010), Work Completed (4/26/2010), Scheduled Out (4/26/2010), Delivered (4/26/2010), and Billed (4/26/2010).

iAutoFocus Work Order Screen - General Tab - Date Info Radio Button

Of all these dates, there are only a few that are critical to the use of iAutoFocus: 1) The **Authorized** date indicates the day that the estimate is turned into a job or work in progress. Without an authorized check or a date in that file, it will not be part of your Work In Progress group on the left navigation bar.

2) Once a file is marked **Delivered** it is moved out of your Work in Progress screen and goes to the All Completed Work.

3) Once a file has been marked **Billed**, it is moved onto the financial statements and the sales records for iAutoFocus.



The other fields, **Scheduled In, Arrived at Shop, Rental Start, Work Started, Work Completed,** and **Scheduled Out,** are recommended and very handy in keeping your jobs organized however, will not affect where the file is located in iAutoFocus.

The **Note & Options** field at the bottom of the General Tab is for adding comments about the job to the file which can be customized base on who is reviewing them.

Insert Time Stamp – Will insert the ID of the person entering the note, the date, and the time.

Internal – Internal notes for only the shop to see.

External – Comments placed here will print on all the reports that the customer will see.

Options – Imports vehicle options from the estimate (such as Intermittent Wipers, Tinted Glass, Body Side Moldings, Clear Coat Paint, Power Brakes, etc.) which may assist you in making notes however this button will not allow any other comments to be added.

WebView Customer – Will post comments to your web for the customer to track site if you have our WebView feature.

WebView Insurance – Will post comments to your website for the insurance companies to track jobs.

To add a note, the user would click on the type of comment (Internal, External, etc.) then click on Insert Time Stamp, type the necessary comments, and click Okay.

E.g.

Heather – 5/1/2010 – 3:34PM Parts have been ordered.

### **Insurance Tab**

To access the insurance information, click on the Insurance Tab at the top of the Work Order screen. Most of the information will already be populated from the estimate but can be changed or updated. The screen is split into four sections: **Insurance Company Information, Adjuster Information, Insurance Company,** and **Insured Information.**

The screenshot shows the 'Insurance' tab of the iAutoFocus Work Order screen. It features a top navigation bar with tabs for 'General', 'Insurance', 'Line Items', 'Totals', and 'Payments'. The main content area is divided into four sections:

- Insurance Company Information:** Fields for Profile #, Name (Adriatic Insurance Company), Address (777 Main Street), City, ST, Zip (Anytown, UT 84444), Phone 1 & 2, and Email.
- Adjuster Information:** Fields for Profile #, Name (Alex Emerald), Address (7 Any Avenue), City, ST, Zip (Anytown, UT 84444), Phone 1, and Phone 2.
- Insurance Company:** Fields for Claim Number (45754388888), Policy Number (1), Date of Loss (5/15/2009), Deductible (500.00), and UDS Number (Sua-0864).
- Insured Information:** Fields for Profile #, Name, Address, City, ST, Zip (Anytown, UT 84111), Phone 1, and Phone 2.

At the bottom of the screen, there is a 'Workorder Total \$1,300.00' field and 'Okay' and 'Cancel' buttons.

iAutoFocus Work Order Screen - Insurance Tab

Note: Sometimes what comes across from the estimate may not match the insurance contacts you have on file. Most users like to keep **Insurance Company Information** consistent and can do so by double-clicking on the **Profile #** field and allow you to select an insurance company contact from the list provided in Insurance Contacts.

Note: In the Insurance Company section, the customer's deductible is listed. If any changes need to be made, you can do so by clicking in the deductible field and changing the amount accordingly.

### Line Items Tab






To access the Line Items screen, open a Work Order and click on the Line Items Tab at the top of the screen. Here you are able to see the repair of the estimate including descriptions, part numbers, price, labor and refinish times, etc. You are also able to see if a supplement exists by looking for a check mark in the **Sup** column. If an Adjustment was made that was imported (for more information see Import Translation) into iAutoFocus, you will see a checkmark in the **Adj** column.

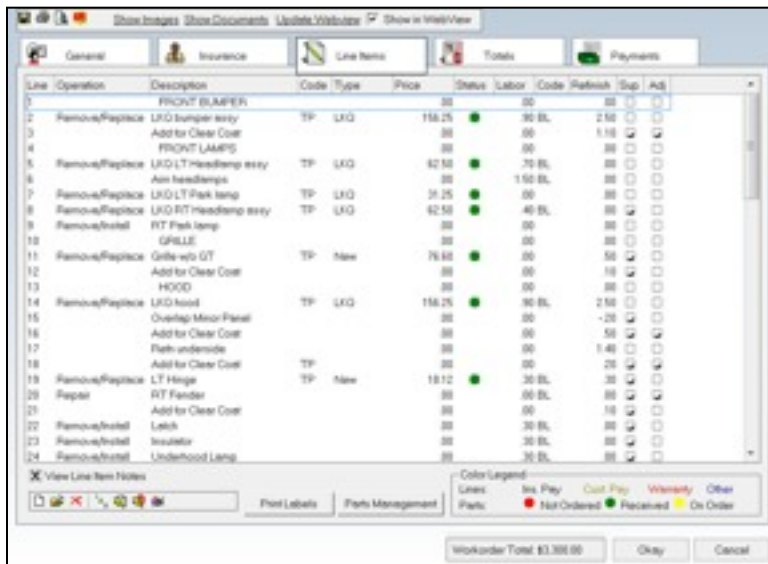
If you double click on any part, you will be able to drill down on specific information about that part: who you ordered it from, the price you paid, estimate price, and supplement price, quantities, part, labor, and refinish times.

You can use the toolbar at the bottom of the line items screen to add or modify line items on this workorder.



iAutoFocus Work Order Screen - Line Items Tab Toolbar

The first icon  will add a new line, the yellow folder  will allow you to open the highlighted line item (same as double-clicking  on a line item), and the red X  will delete the highlighted line item. 123  allows you to re-number line items. E.g. If you click the first icon to Add a new line item, it will automatically add the item to the end of the list. If want to move that item, you can double click on the line item, change the number in the **Line** field to the correct number, close the line item, and click the 123 icon. This will resort the list by number placing your new line item where it should be.



iAutoFocus Work Order Screen - Line Items Tab

Two additional buttons appear on the bottom of the line items screen near the center of the page. One is an alternate route to **Parts Management** (also accessible by right-clicking on a work order and choosing Parts Management or clicking on Parts Management directly from the left navigation bar) and the other, **Print Labels**, provides a handy tool for printing different types of parts labels to help keep track of your part inventory.

### Totals Tab

The Totals screen is accessed by opening any work order and clicking on the Totals Tab at the top of the screen. You can

view the **Combined, Estimate, or Supplement** totals by clicking on the appropriate radio buttons at the top.

On the left side of the screen, available subtotals include descriptions for: Labor, Parts, and Other and are further broken down by units, rates, subtotal amounts, tax percentages, and tax amounts.

Rate and Tax Percentage columns can be changed in this screen by clicking in the appropriate fields and typing the new rate or tax percentage. Once you click off of that line, all totals will be recalculated automatically.

Note: You can change the entire file to tax exempt by clicking back on the **General Tab** and clicking on checkbox entitled **Tax Exempt** and the top of the window.

The screenshot shows the 'Totals' tab in the iAutoFocus software. At the top, there are tabs for 'General', 'Insurance', 'Line Items', 'Totals', and 'Payments'. Below these, there are radio buttons for 'Combined', 'Estimate', and 'Supplement'. The main area is divided into several sections:

- Labor Subtotals / Efficiency:** A table with columns for Description, Units, Rate, Subt., Tax %, and Tax. It lists items like Refresh Labor, Body Labor, Mechanical L., Frame Labor, and Detail Labor.
- Parts Subtotals:** A table with columns for Description, Units, Rate, Subt., Tax %, and Tax. It lists Taxable Part and Parts.
- Other Subtotals:** A table with columns for Description, Units, Rate, Subt., Tax %, and Tax. It lists Tools/Ware, Paint Materials, and Taxable Other.
- Grand Total:** A summary section showing Total Labor, Total Replacement Parts, Total Other Charges, Sub Total, and Grand Total.
- Total Payments:** A section showing Total Payments and Balance Due (in red).
- Insurance Pay:** A section showing Insurance Pay and Customer Pay/Deductible.
- Technician:** A table with columns for Labor Code, Primary Tech., and Secondary T. It lists various labor codes like Body Labor, Detail Labor, Frame Labor, Mechanical L., and Refresh Labor.

At the bottom of the window, there are buttons for 'Workorder Total \$1,300.00', 'Okay', and 'Cancel'.



iAutoFocus Work Order Screen - Totals Tab


On the right side of the Totals Tab, you can see **Grand Totals** for the file. Any balance due will show in **Red** and **Insurance Pay** and **Deductible** amounts are listed. On the bottom right side of the window, you can assign a technician (and a Secondary technician if needed) by clicking on the Primary field next to the labor type you want to assign a technician for and using the drop-down arrow to select the appropriate employee.



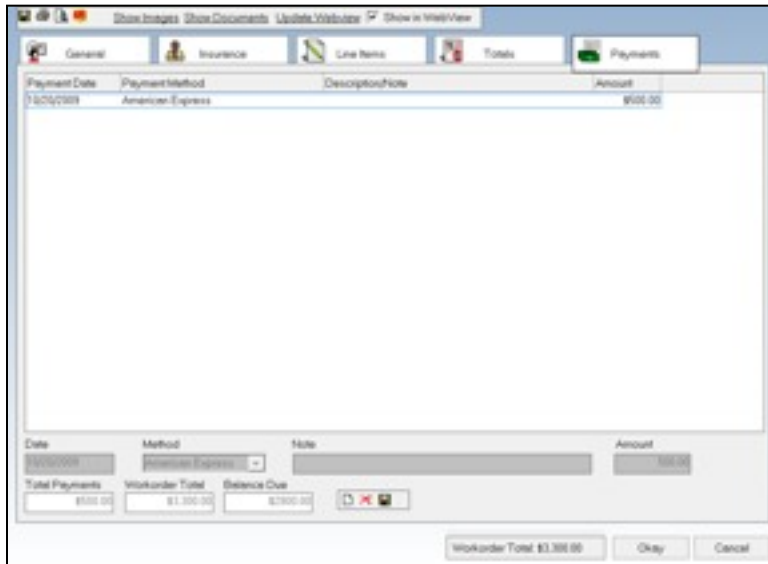
## Payments Tab

To access the Payments screen, open any work order and click on the **Payments** Tab at the top of the window. Here you can view, add, and delete payments for the work order.

To add a payment, click on the **New Payment** icon at the bottom of the window. The **Date** field will default to today's date but can be changed if necessary. Use the drop-down arrow in the **Method** field to choose the appropriate type of payment (previously determined in your Setup). Enter any pertinent comments in the **Note** field such as  number and the type of check (insurance or customer), then enter the amount in the **Amount** field. Once you are finished with the payment, click the **Save** icon  and the payment will save and the **Balance Due** field will be re-calculated.



To delete a payment, click on the payment to be deleted and then click the **Delete Payment** Icon . Once again, **Balance Due** will be re-calculated.

To edit a payment: simply click on the payment, make the desired changes, and click the Save icon. If necessary, the Balance Due field will re-calculate.

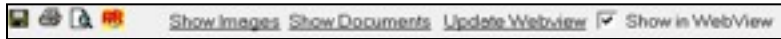


iAutoFocus Work Order Screen – Payment Tab

## Preview & Print

Many forms and printouts are available from the workorder for your use. To access those forms, open any workorder and use the icons at the top of the window. The icons  associated with 

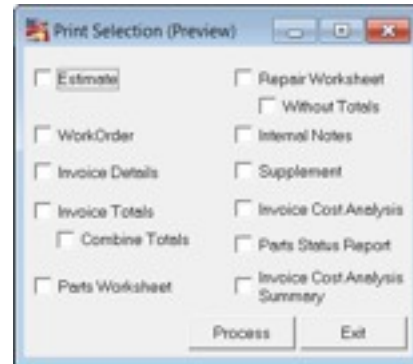
forms and printouts are the **Printer Icon** , the **Preview Icon** , and the **RR (Report Righter) Icon** .



iAutoFocus Work Order Screen – Print and Preview Icons

Under the **Preview Icon**, you have many general report options (these are original reports created by our users since inception and kept here for everyone's use):

- Estimate
- Work Order
- Invoice Details
- Invoice Totals
  - Combine Totals
- Parts Worksheet
- Repair Worksheet
  - Without Totals
- Internal Notes
- Supplement
- Invoice Cost Analysis
- Parts Status Report
- Invoice Cost Analysis Summary



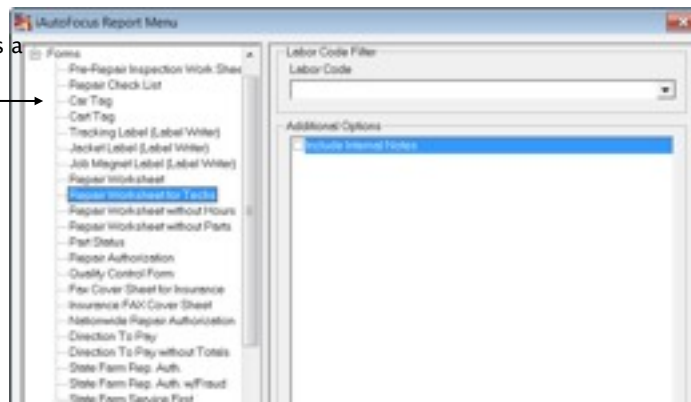
iAutoFocus Print and Preview

To use, simply place a checkmark in the report you wish you generate, click the **Process** icon, and then review or **Print** as necessary.

Note: If you choose the Printer icon directly from the work order, the same options will show however, when you click Process, the report will go directly to the printer without being previewed.

The **RR** icon displays numerous reported added since our original ones were created. Selecting one of these reports will provide a description of the report at the bottom left of the screen and provide any necessary options to the right. Users can choose to print, preview, or export to a .pdf.

This box provides a list of useful reports.



This box changes to reveal options based on the selected report.



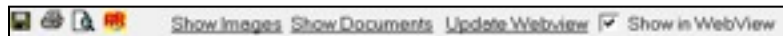
This box provides a description of the selected report.

iAutoFocus RR Screen

### Images & Documents

From any work order, you can utilize the quick links to **View Images** or **View Documents** related to your file. To attach images, click on the **Show Images** link. This will open up your browser to the location your images are being stored for this file. Once there, you can copy and paste, drag, or move pictures from wherever you keep your camera's photos into the browser. Now that those pictures have been associated with this file, any time you open up this work order and click on **View Images**, those pictures will show.

Note: If you are using the WebView feature, you can drag photos into the WebView folder then update comments on your company's website by using the Update WebView link and check box. For more information, contact NewEra directly at 877-447-4707.



iAutoFocus Work Order Screen – Show Images and Show Documents

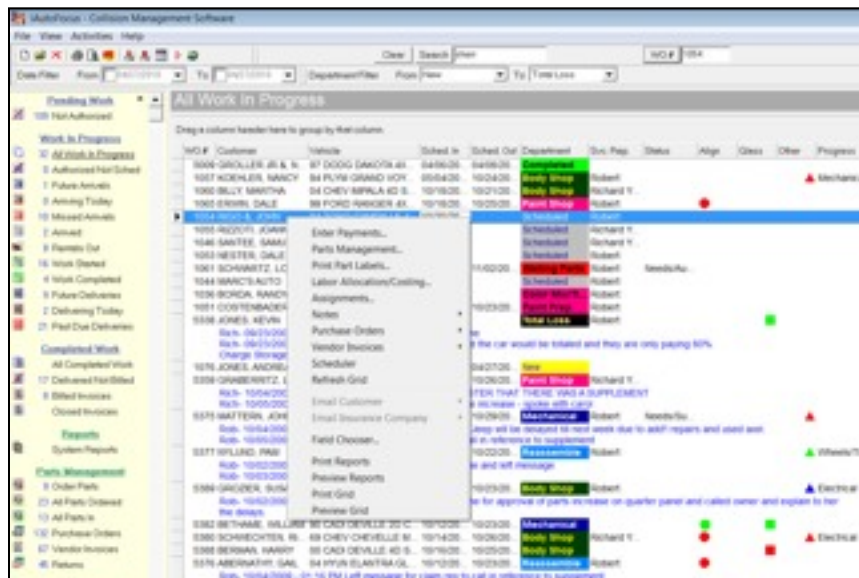
**Show Documents** work in a similar fashion. Simply scan and/or save any documents here that you want to keep with this file.

### Work Order – Right Click Options

From the Main Grid, you can Right-Click (using the button on the right side of your mouse) on any work order revealing a shortcut to any options within iAutoFocus.

To use the shortcut menu, highlight the desired work order, then right click using your mouse. When the menu appears, use your mouse to select the desired shortcut.

- Enter Payments – to enter payments
- Parts Management – to order parts
- Print Part Labels – to print part labels
- Labor Allocation/Costing – to assign technicians to the job and flags
- Assignments – to assign specific technicians to specific tasks
- Notes – to modify all notes types on the file
- Purchase Orders – to open Parts Management or existing Purchase Orders
- Vendor Invoices – to open Parts Management or existing Vendor Invoices
- Scheduler – to the load based scheduler
- Refresh Grid – refreshes page
- Field Chooser – provides options to add or remove column headings on the grid for easier viewing
- Print Reports – same as printer icon on the toolbar
- Preview Reports – same as preview icon on the toolbar
- Print Grid – prints the grid currently being viewed
- Preview Grid – puts the grid in a preview screen



iAutoFocus Main Grid – Right Click Shortcut Menu

## Parts Management

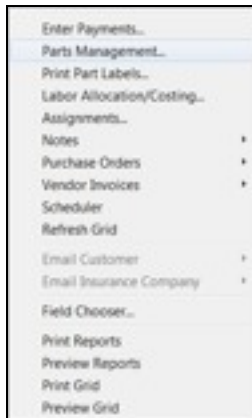
In this section you will learn how to order parts, record vendor invoices, enter parts costs, price discrepancies, process returns,



account for miscellaneous costs, and print parts labels while using your iAutoFocus collision management software.

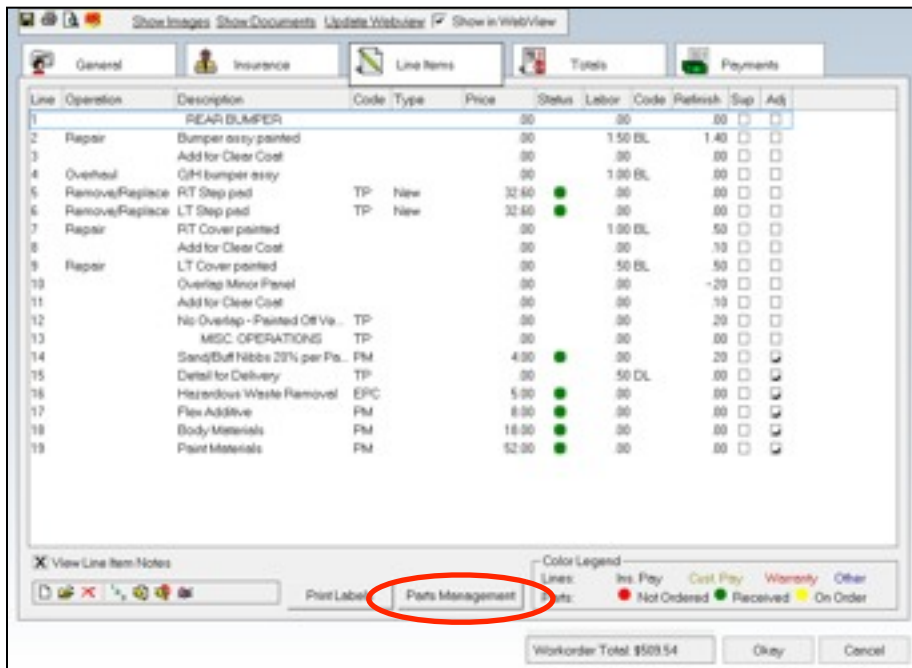
## Purchase Orders

Parts Management can be accessed from two different areas in iAutoFocus. The first way is to highlight any work order on the main screen, right click to access the quick menu, and then choose Parts Management.



iAutoFocus Right Click Parts Management

The second way is to double click on any work order, click on the “line Items” tab, and then click on the Parts Management button at the bottom of that screen.

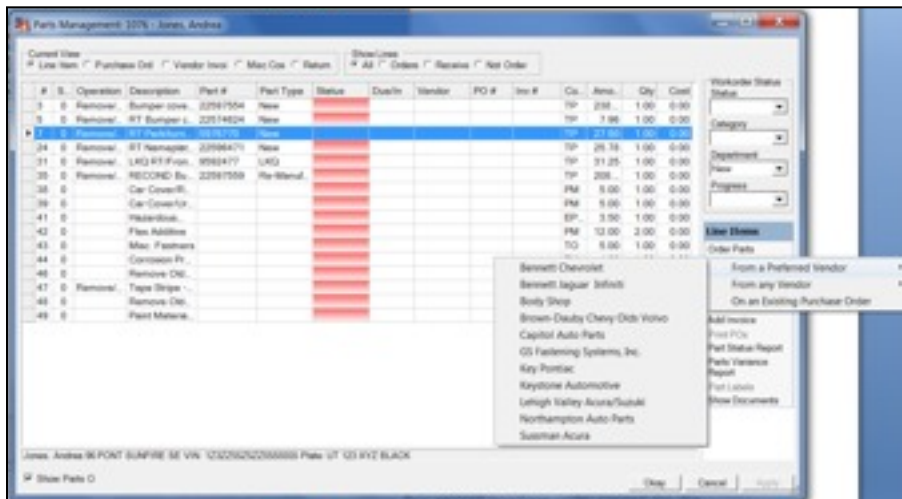


iAutoFocus –Line Items Screen – Parts Management Button



individual items, click on the first part, then hold down the Ctrl key while selecting any other part in the list. To select a group of items, click on the first part in the list, hold the Shift key and then click on the last part in that group.

Once your parts are highlighted, the second step is to click the “**Order Parts**” option on the right side of the screen. A sub menu will appear allowing you to choose a “**Preferred Vendor**” or “**Any Vendor**” list. When first using the system you will choose the vendor from the “Any Vendor list but as you establish vendors for a particular vehicle type, the preferred vendor list will be populated making the selection easier.



iAutoFocus – Parts Management Screen – Order Parts From a Preferred Vendor

Note: To edit your vendor lists, access the “Vendors” section under “Contacts on the left navigation pane of the main screen. TIP: If your vendor list is long and you are looking for a vendor that begins with the letter “S”, we recommend that you type the next letter of the alphabet in the Search box (which in this case is “T”) which will move the cursor down to the first item begin with a “T”. All vendors beginning with “S” will be shown above the cursor and therefore more visible to you.

Once you select the vendor from either list you are taken into a **New Purchase Order** with the previously selected parts pre-populated in the form.

#	Description	Part #	Co.	Type	Qty	Notes	Status
3	Bumper cover...	22567554	TP	New	1		Ordered
5	RT Bumper co.	22574624	TP	New	1		Ordered

iAutoFocus – New Purchase Order Screen

Note: The purchase order number is determined by your choice in the initial setup screen, under File, Setup, and Purchase Order Setup. Most shops use the work order number as the purchase order number. To differentiate between orders and avoid confusion, your second purchase order created for the same job will have a “-1” at the end. The third purchase order for the same job will be appended with a “-2” and so forth.

On the Purchase Order screen, the “**Attention**” and “**Due**” fields are populated from the vendor profile but can be modified here if necessary.

The “**Shop Contact**” box is a free-form notes area and whatever is typed in that box is remembered and brought into each subsequent purchase order. This is useful for entering comments that you want attached to each purchase order.

The “**Delivery Remarks**” and the “**Purchase Order Remarks**” are additional note fields however; comments typed here are for this purchase order only.

Additional short comments for a specific line can be added by clicking on the desired line item and entering the information in the “**Notes**” column.

For the last step, if you are finished, you can click “**Okay**” at the bottom right of BOTH the Purchase Order Screen AND then the Parts Management Screen to save your changes.

If you are not finished, at the bottom left you can click on “**Add Line**” which will allow you to choose additional lines that might have been missed from the work order and need to be added to this purchase order.

Lines can be removed from a purchase order by clicking on the **Arrow** indicator on the left side of any line (shown below). This will highlight the entire line. You can now press the **Delete** key on your keyboard and the line will be removed from this purchase order. You will now be able to order it from a different vendor at a later time.

Ordered Lines								
#	Description	Part #	Co.	Type	Qty	Notes	Status	
3	Bumper cover...	22597554	TP	New	1		Ordered	
5	RT Bumper co...	22574624	TP	New	1		Ordered	

iAutoFocus - New Purchase Order Screen - Ordered Lines Close-up

The “**Print PO**” button at the bottom of the screen will show you a preview of what will be sent to the printer. You can change the printer location by clicking the **Page Setup** icon to the left of the printer icon. You can print the purchase order by clicking the **Printer** icon. Once the purchase order is printed you can close the print preview window by clicking on the “**X**” at the top right of the screen or the “**X**” to the right of the printer icon.

You can also email the purchase order by clicking the “**Email PO**” button at the bottom of the screen. If you have not entered an email address in the vendor profile you will be prompted for an email address.

Note: If this function is not working then you need to enter an SMTP server in the initial setup screen of company information. (File/Setup/Company Information) If you do not know your SMTP server, or do not have one, then type (mail.1and1.com) in that box. You can also enter a default reply to address for purchase orders in this same setup screen. We have found that when sending a purchase order to a vendor it is sometimes helpful to use the semi-colon“;” after the vendor’s email address then enter your own email address and that way a copy is sent to your email system as well.

As a reminder, at the bottom right of the purchase order you can click **Okay** to save and close the purchase order. If you press **Cancel**, the purchase order will be discarded. When you click **Okay** on the Purchase Order Screen you will be returned

the Parts Management Screen where you still have to click **Apply** or **Okay** to close Parts Management and save the purchase order. If you **Cancel** out of Parts Management, all entries entered will be discarded.

Once the purchase order is created you can now see that the lines are changed from “**RED**” to “**YELLOW**” indicating that they have been ordered.

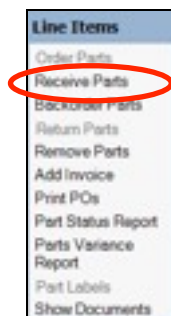
You can now repeat these steps until all parts have been ordered. Parts that are received internally are usually left in a not ordered state until the job is closed.

Note: This works if the parts that are left are not listed with an income account of “TP, NP, TS, or NS”. If they are listed with any of those income accounts we recommend that you use import translation to translate those parts to another materials income account. For more information, please review information on Import Translation.

Another way to handle internal parts is to highlight all the additional parts and receive them into a vendor invoice for your own shop name. We recommend that you use the work order number as the invoice number. This way the system will know that all parts have been ordered and will automatically change the Parts Status from “Not Ordered” to “Ordered” on the work in progress grid and in the parts management tracking module.

### Receiving Parts

Receiving parts is very similar to ordering parts. You can receive parts by clicking on the parts that have arrived but instead of clicking order parts on the right side of the screen, you click “Receive Parts” instead.

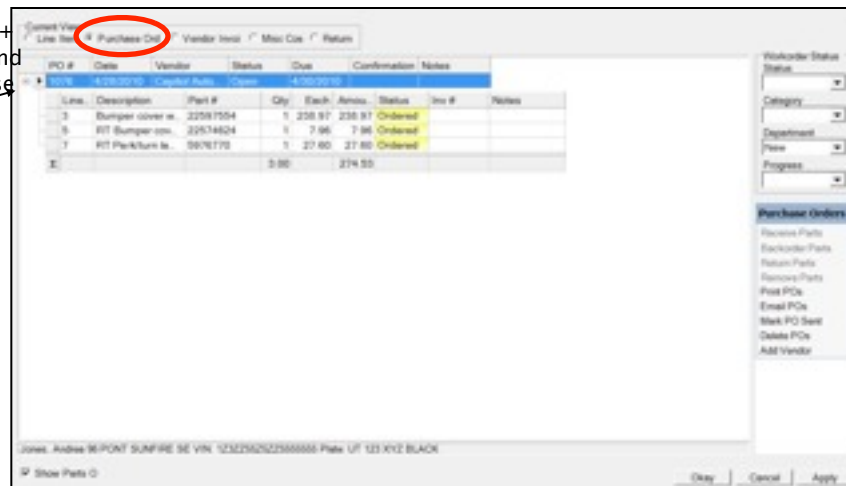


iAutoFocus – Parts Management – Receive Parts

Note: You cannot select parts that have been ordered from different vendors and try to receive them. However, it is not necessary that the part be ordered in iAutoFocus prior to receiving it. For new users, you can start by just receiving parts and as you begin to get new jobs in the system, you can then create purchase orders in advance of receiving parts. If a part is not on the estimate that is being received, we recommend that you add the part to the estimate BEFORE recording the vendor invoice. However, if a part was received that was never order and is not needed, or a miscellaneous charge is on the invoice for core charges or shipping you do not need to add these lines to the estimate (the entries would just cancel each other out).

If a purchase order was created prior to the vendor invoice being received the easiest method of receiving the parts is to click on the purchase order radio button at the top of the Parts Management screen and then expanding the appropriate purchase order by clicking on the “+” sign to the left of the purchase order. You can now select any parts that have been received from the lines on the purchase order by clicking and holding either your Ctrl or Shift key and then click Receive Parts on the right side of the screen.

Click on the + sign to expand your purchase orders



iAutoFocus – Parts Management Screen – Purchase Order View

To avoid repeating steps, we have found that it is easier to select ALL ordered parts that could be on the vendor invoice and choose **Receive Parts**. Then, on the next screen (**Vendor Invoice Screen**), add costs to the lines received, and delete lines that are not on the vendor's invoice.

Note: To receive parts that have not yet been ordered, you will be prompted to select the vendor before displaying the vendor invoice screen.

On the **Vendor Invoice Screen** you will enter the vendor **Invoice #** and the vendor **Invoice Date**. If a **Profit %** is entered in the vendor profile setup then the cost information is already calculated based upon the list amount of the part. If you enter a **Profit %** and press TAB then the cost amount is calculated for each part based upon the list amount.

iAutoFocus – Vendor Invoice Screen – Edit Vendor Invoice

Whether you choose to do it this way or to manually enter the costs on each line, the choice is up to you. To do it manually, you will go through the lines and find them on the actual paper vendor invoice, modify the list amount if necessary and enter the cost amount of the part.

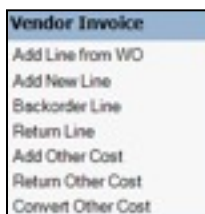
It is easier to use the up and down arrow keys than clicking on each line and then entering the part cost. Once you have been through the iAutoFocus vendor invoice and entered all the costs you should verify the invoice amount matches with your vendor invoice in hand. If you have any parts that have a cost amount of “0” you will now remove those lines from the vendor invoice by clicking on the arrow on the left side of the line so that the entire line is highlighted and then pressing the delete button on the keyboard.



An easy way to do this is to sort by the cost amount by clicking on the (List Amount or Ex Cost) cost amount column header and then you can click the first line with a cost of "0" and press the delete button until all the lines are removed that don't have a cost associated with them that don't belong on this vendor invoice.

Note: In the original **Setup** there is an option under **Company Information** to **Automatically Generate Supplements in PM** (Parts Management). If you have this option selected then the line item amount will be changed and a supplement will be created for all parts price increases. Most shops do not have this option selected as they typically will go back to the estimating system and process their supplements there and then transfer the file back into the management system. For more information, contact NewEra at 877-447-4707 about Supplements.

In the **Vendor Invoice** Screen there are some options on the right side. The **Add Line from WO** (Work Order) will allow you select additional lines that might have been missed when originally selecting the lines for the vendor invoice. If you do not see the line you are looking for it is because it either does not exist on the estimate, it has been received on another vendor invoice, or it is has been ordered from a different vendor. If the part was received on a prior invoice and then was returned it will be available again to select or if it was removed off the purchase order for the incorrect vendor then it will be available again to select.



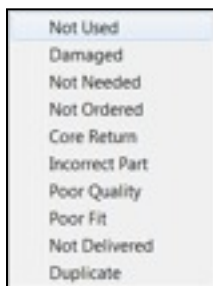
iAutoFocus - Vendor Invoice Screen - Edit Vendor Invoice

The **Add New Line** option is not one that is recommended for the typical collision repair center as it will actually add a line to the estimate. Therefore, if you are using an estimate system, it will no longer match the estimate that was created. We recommend that the line be added to the estimating system first, re-import the estimate, then select it from the **Add Line from WO** option. Lines that are marked red indicate that they are or-

phaned from the charges on the estimate either because they were deleted from the estimate or the part number was changed in a way that the system no longer recognizes it as the same part.

The **Backorder Line** option will remove it from the vendor invoice and update the status of the part to being back ordered. Note: The part must actually be ordered in the system first before the “Backorder Parts” option will be available to click on.

The **Return Line** option will move the part to the return management section where its actual Return Date and Credit from the vendor can be tracked. When you click on **Return Line**, a list of commonly used reasons indicating why a part is returned are shown such as; not used, damaged, not needed, etc. for why a part is returned can be edited or added to. If you want to add to the list of part return reasons this can be done in the initial setup screen (File/Setup/AutoComplete AutoSave/Returned Parts section).



iAutoFocus – Vendor Invoice Screen – Return Reasons

The **Add Other Cost** option is used for adding a cost to the vendor invoice that will not be passed on to the customer. This is used for entering such things as core charges, shipping charges, tax on vendor invoices, parts damaged by the shop, or parts that were received that were never ordered and need to be returned. Additionally if a part was damaged by the vendor and they will be issuing a credit amount you will subtract the amount of the credit from the cost on the part line then add a miscellaneous cost line for the amount of the credit you will receive and then you can **Return the Other Cost** line to track receipt of the credit.

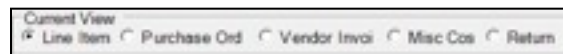
The **Convert Other Cost** option is not recommended for normal use, but when selected along with parts matching will move an

item from **Other Costs** to the **Line Items** section of the vendor invoice.

Once you have used all the appropriate options on this screen and the vendor invoice is entered click **Okay** at the bottom right to save the invoice and return to the Parts Management screen. The **Cancel** option will discard all changes or entries made in the vendor invoice. Don't forget that on the Parts Management screen you need to click **Apply** or **Okay** to save all changes made within Parts Management. The **Cancel** option will discard all entries made regardless of whether you clicked **Okay** on the vendor invoice screen. Note: Fortunately, if you click cancel, you will receive a popup asking you if you want to save changes. Click "Yes" if you want your changes saved.

### Views

Along the top of the Parts Management screen you can track the **Line Items** on the estimate, the **Purchase Orders** created, the **Vendor Invoices** entered, **Miscellaneous Costs** entered, and parts marked for **Return**.



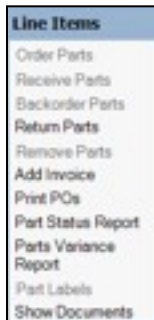
iAutoFocus – Parts Management Screen – Current View Radio Buttons

If a part is listed in **Miscellaneous Costs** and still needs to be returned you can click on the part and choose the **Return Misc. Cost** option on the right side of the screen. If you are on the **Line Items** screen you can choose the option to **Return** a part (the part must be in a "Received" status to do this).

Once a part has been marked as **Returned** the status reverts to the prior state it was before the part was received regardless of the reason you entered for the return. For instance, if you had ordered the part from ABC vendor, **Received** the part, and then marked the part as **Returned** with the reason NOT NEEDED, the part is still going to be listed as **Ordered** from ABC Vendor. You will need to reselect that line and then click on the **Remove Parts** option on the right side to remove it from the Purchase Order. It will be returned to the state of **Not Ordered**. This is important if the part will be deleted from the estimating system and then re-imported into the management system. If the part is no longer part of the estimate and you still have it marked as

**Ordered** or **Received**, the import system will leave the charge for the part and add an adjustment line to the bottom of the import screen. This is designed to help prevent you from paying for a part that is not being billed to the customer.

On the **Line Item** section of Parts Management there are additional features on the right side of the screen.



iAutoFocus – Parts Management Screen – Line Items View

If a part status shows “Ordered” you can select the line and choose **Print PO’s** from the menu on the right side of the screen to print the purchase order associated with that line.

Another one of these features is the **Part Status Report** showing which parts have been ordered, which parts have been received, which parts are on back order and which parts have not yet been ordered just for this work order.

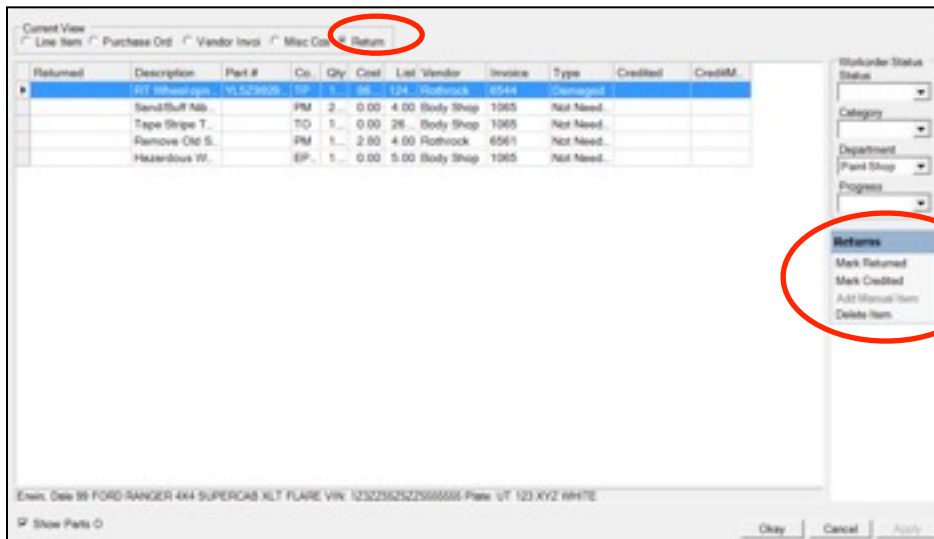
The next option from the menu on the right side of the screen is **Parts Variance Report**. When closing a job it is important to view the parts variance report and make sure that all supplements have been processed correctly. You can also click on the **Misc Costs** view at the top of the Parts Management to make sure that all Misc. costs have been returned or understand why they are being paid for by the shop, as well as the **Returns** view at the top to make sure that all parts marked returned have been sent back to the vendor for credit.

**Part Labels** can also be printed from the menu. Printing parts labels after a purchase order is generated is a great way to tag parts as they arrive and make sure that all parts are being handled properly and associated with the appropriate work order.

The last option, **Show Documents**, allows access to any scanned documents stored with the work order. Scanning ven-

vendor invoices into your system and storing them in the documents folder will help you more efficiently track your parts, and allow more people access to the archived information long after the vendor invoice has moved to accounts payable for processing payments.

Although, tracking returns and credits is typically done using the Returns option under Parts Management on the main management grid, you can track them in the “Return” Screen as well. If you select the **Returns** view radio button at the top of Parts Management there are new options on the right side of the screen.



iAutoFocus – Parts Management Screen – Return View

The first one is to **Mark** [a part as] **Returned**. It will put Today’s date on the returned date of the selected line. The next option is to **Mark Credited** which also enters today’s date into the Credited column indicating a credit has been received from the vendor.

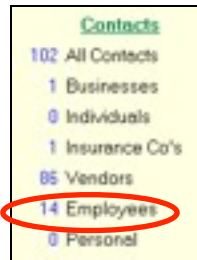
Note: The **Add Manual Item** is currently grayed-out and not functional in this version but is a new enhancement coming which will allow the user to manually add a returned item in this screen.

The last option is **Delete Item**. Deleting a part from the returns screen will put it back onto the vendor invoice it came from and remove the part from needing to be returned.

# Labor Management

## Labor Costing

The first step in costing labor within iAutoFocus is to set up new employees and their pay rates. Scroll down on the left navigation toolbar to **Employees** under the **Contacts** Section.



iAutoFocus – Left Navigation Bar – Contacts

To add a new employee, choose the **New Contact** Icon at the top left of the screen in the icon toolbar.



iAutoFocus – Main Grid – New Contact Icon

Enter the employee information as described on the screen. The necessary fields to enter are the employee's **Last Name**, **First Name**, and the **Display As** fields. The default for the **Display As** is the employee's first name but that can be modified should you have 2 employees with the same first name or if an employee uses a nickname that you are more familiar with.

To enter the employee's pay rate press the **F8** function key on your keyboard while on the **Employee New Contact** Screen. You can enter a flat rate or a commission % by following the number with a % symbol. If you will be using the time clock and want added security for the technician an employee pin number can be entered by pressing the **F9** function key on your keyboard. This will prevent other employees from tampering with their time entries.

iAutoFocus - New Contact Screen

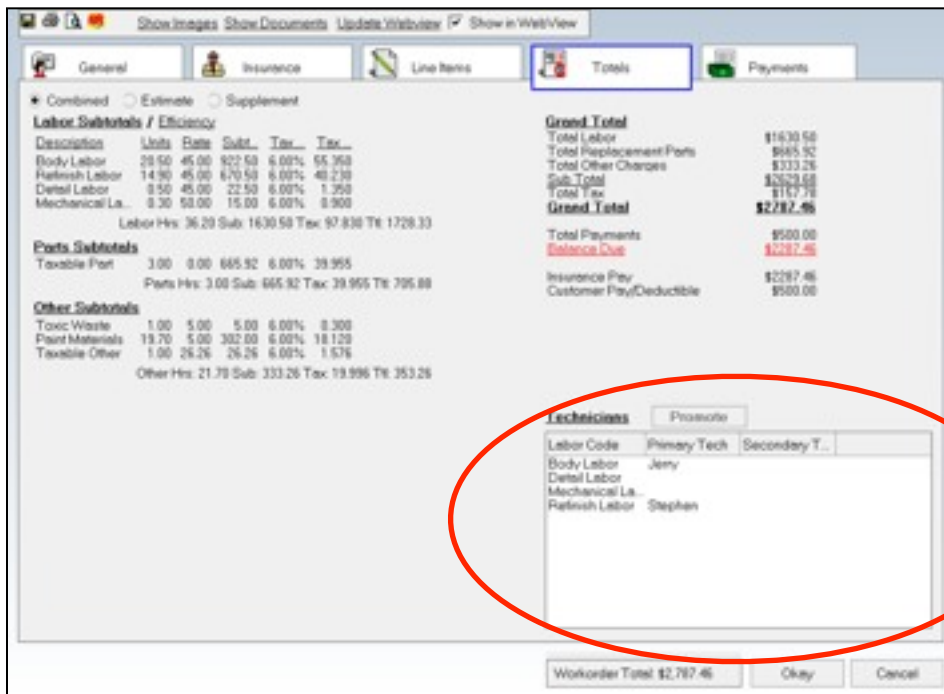
To save the contact information press the **Okay** button at the lower right portion of the screen. To enter multiple employees you can repeat this process or you can simply click **Apply** at the lower right and then choose the **Add New** icon at the top left of the **Employee New Contact** screen.

Once all your employees have been added, you can now begin to assign jobs to the desired technicians performing the labor. There is a field for the body labor tech called BL Tech and a field for the refinish labor tech called RL Tech on the work in progress grids.

ss	Parts Statu	BL Tech	RL Tech
	Received		
Physical	Received	Doug	
	Received	Jerry	
		Jerry	Stephen
	Not Order...		
	Ordered		
	Not Order...		
	Not Order...	Heather T	Jerry
	Not Order...	Carlos	
	Not Order...		
	Received	Jerry	
	Ordered	Carlos	
	Ordered	Doug	Jason

iAutoFocus - Main Grid - BL Tech and RL Tech Close-up

You can simply click on those fields on the grid and use the drop down arrow search to select the desired technician. You can also open a work order and move to the Totals Tab located on the upper portion of the screen. On the lower right portion of the screen is where you can assign techs for all labor types that pertain to that job. Most shops only assign a primary technician but you can also assign secondary techs for each labor type.



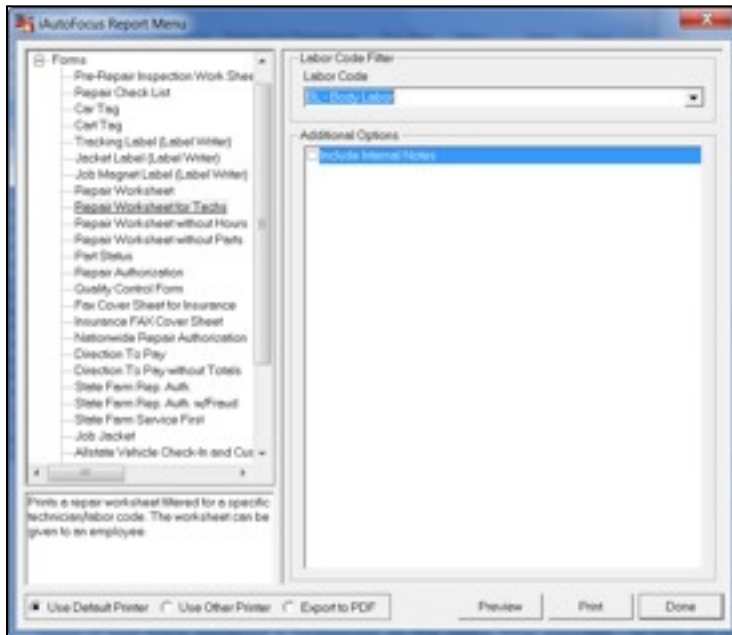
iAutoFocus - Work Order - Totals Tab

Note: Technicians' names are not saved unless you click off the field onto a different field before moving off the screen.

With a technician assigned you can print a repair worksheet for the techs assigned by choosing the RR report icon in the icon toolbar at the top left of the work order or the main toolbar when the grid is displayed and the appropriate work order is selected.

Most shops choose the **Repair Worksheet for Techs** report. You will then select the **Labor Code** and choose **Preview** or **Print**.





iAutoFocus – RR Report Icon – Repair Worksheet for Techs

Note: This report will only print if you have assigned a technician to the labor type selected. If you do not assign a technician to the labor in advance then you will print a Repair Worksheet and not the Repair Worksheet by Tech Report.

Labor costing or flagging can be accomplished in two ways. You can flag labor as the job is closing or you can flag labor from a worksheet that the technician provides prior to pay day. If you are closing the job and want to flag the labor you can click on the **Labor Allocation/Flagging** icon (depicts a person working under a hood of a vehicle) at the lower toolbar of the Line Items screen.



iAutoFocus – Work Order – Line Items Screen – Labor Allocation/Flagging Icon

Or you can choose **Labor Allocation/Costing** with the right click from the selected work order on the grid.



iAutoFocus – Main Grid – Right Click Menu – Labor Allocation/Costing

The various labor types are listed in the upper portion of the screen. The lower left portion of the screen is for shops that are allocating a portion of that labor to one technician and another

portion to another technician. Most shops do not use the allocation section of labor costing. It is merely a reminder for you to know that the labor hours have been allocated to the tech prior to the labor being performed. Some shops used this to track the labor assigned from an estimate and additional labor assigned after the import of a supplement.

The screenshot shows the iAutoFocus - Labor Allocation/Flagging screen. It features a table of labor types, an employee selection dropdown, and two main data panes for allocation and flagging. A 'New' button is located at the bottom left, and an 'Okay' button is at the bottom right. The status bar at the bottom indicates the user is 'MATTERN, JOHN' and the work order is 'ST JEEP WANG'.

To actually flag or assign the labor this is done on the lower right portion of the screen. To flag time choose the **Employee** in the drop down box in the center of the screen and then click the **New Flag Entry** icon at the lower center. The **New Allocation** flag looks similar and is located at the lower left portion of the screen. Once you have clicked **New Flag Entry** the remaining portion of labor is then flagged to that technician and the pay rate is pulled from the employee contact information screen.

You can modify the **Date Flagged**, the **Hours Flagged** and even the flag **Rate** if necessary. E.g. If there were 10 hours of labor and a prior entry existed for the technician with 5 hours flagged and you add a flag entry it will default to a new entry with the remaining 5 un-flagged hours. If these hours are flagged from the work order they will be carried onto the payroll screen in preparation for payday. Flagging labor before closing the file is a great way to ensure that all job-costing is completed and verified prior to closing a work order.

When you are preparing for payday you can scroll down the main navigation toolbar to Labor Costing.



iAutoFocus - Left Navigation Bar - Labor Costing

It will open and ask you for a **From** and **To** date for the payroll period. All entries are displayed according to the flag date entered. The flag or **Work Date** will default to the **To** date of the labor costing screen. With the dates set you can select an **Employee** from the drop-down list and their entries that fall in the date range will be displayed on the lower portion of the screen. If you have flagged labor for closed work orders then those entries can be matched against their requested labor flags.

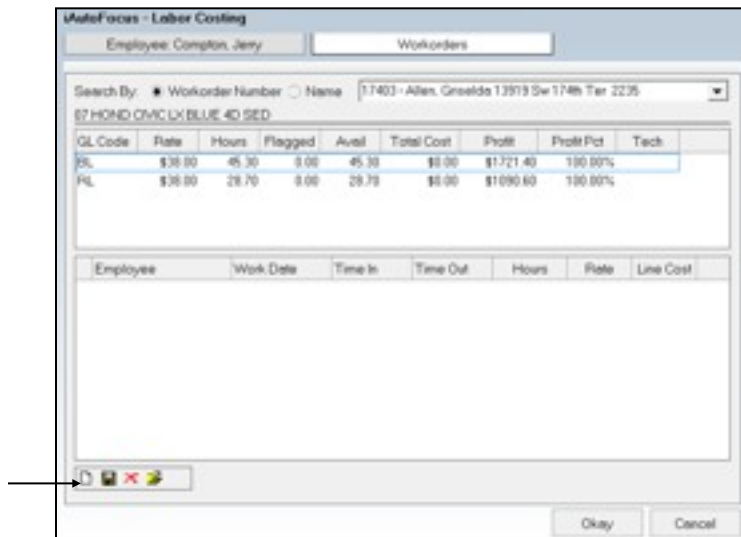
 A screenshot of the iAutoFocus Labor Costing application window. The window title is 'iAutoFocus - Labor Costing'. At the top, there are two tabs: 'Employee: Compton, Jerry' (selected) and 'Workorders'. Below the tabs, there are input fields for 'Work Date' (set to 3/31/2010), 'From' (set to 3/16/2010), and 'To' (set to 3/31/2010). There is also an 'All Dates' checkbox. Below these fields is an 'Employee' dropdown menu showing 'Compton, Jerry (Body Tech) ID#14'. The main area contains a table with the following data:
 

WO #	Date Worked	Date Paid	Type	Rate	Description	Hours	Pay Rate	Amount
1053	03/08/2010		BL	\$45.00	FOHD FOCUS ZK	1.00	\$24.34	\$24.34
0	03/31/2010		MS	\$0.00	Miscellaneous	0.00	\$24.34	\$0.00
0	03/31/2010		MS	\$0.00	Miscellaneous	0.00	\$24.34	\$0.00

 At the bottom of the table, there is a summary row: 'Total Entries: 3', 'Hours Flagged: 1.00', and 'Total: \$24.34'. Below the summary are buttons for 'Print' and 'Pay'. At the very bottom are 'Okay' and 'Cancel' buttons.

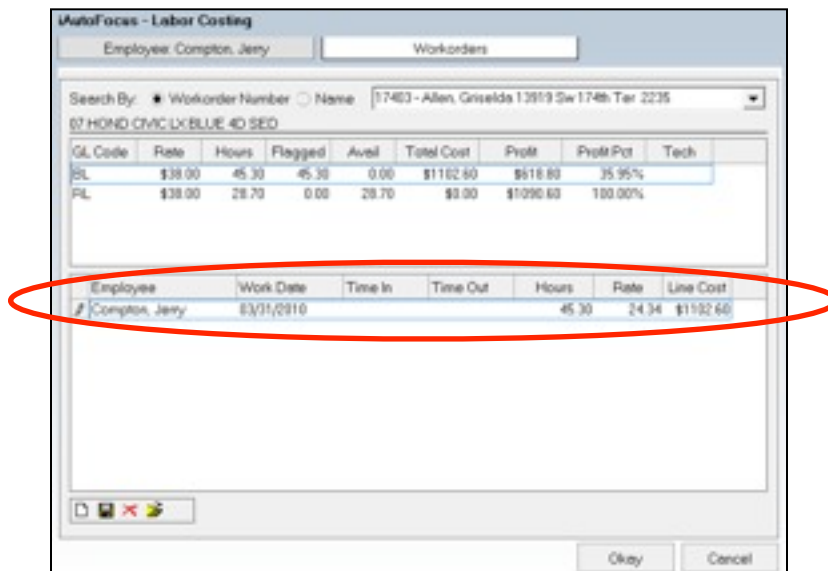
iAutoFocus - Left Navigation Bar - Labor Costing (Employee Tab)

Partial hours requested for jobs still in progress can be added by clicking onto the **Workorders** Tab at the top of the screen. You will enter the work order number or select the work order from the drop down tool bar. Then select the labor type and then click the **Create New Labor Costing Record** icon at the lower portion of the screen.



iAutoFocus - Left Navigation Bar - Labor Costing (Workorders Tab)

This will work like the labor costing described above that was used from within the work order. It will add an entry with the flag date from the labor costing screen. It will flag the remaining unpaid hours for the labor type and default to the labor rate in the employee contact screen. Again the flag or **Work Date**, the **Hours** paid and the pay **Rate** can be modified on this screen.



iAutoFocus -Workorders Tab - Create New Labor Costing Record

Additional jobs can be flagged by typing the work order number at the top of the screen and then choosing the labor type in the upper portion of the screen and the **Create New** (White sheet of paper) icon at the lower left. You can even open the work order to review the

file by clicking the **Open Associated Work Order** (yellow folder) icon at the lower left. You can delete a flag entry by clicking the **Delete Selected Labor Costing Record** (Red 'X') icon at the lower left.



iAutoFocus -Workorders Tab - Toolbar Close-up

When all additional entries for requested pay have been made you can click back to the employee tab and verify that the total hours to pay match with the employee worksheet they have provided.

If your technician is being paid for a miscellaneous entry that is not part of a work order inside iAutoFocus then the **Add New Miscellaneous** icon can be clicked at the lower left to add an entry for work performed on cars that were prior to the use of iAutoFocus, for vacation time, or other miscellaneous pay items. Some shops pay on a sliding scale and the pay rate for all entries can be modified on this screen depending on the hours produced by clicking into the pay rate field.

WO#	Date Worked	Date Paid	Type	Rate	Description	Hours	Pay Rate	Amount
1053	03/30/2010		BL	\$45.00	FORD FOCUS ZK...	1.00	\$24.34	\$24.34
0	03/31/2010		MS	\$0.00	Miscellaneous	0.00	\$24.34	\$0.00
0	03/31/2010		MS	\$0.00	Miscellaneous	0.00	\$24.34	\$0.00
17403	03/31/2010		BL	\$38.00	07 HOND CIVIC LX B...	45.30	\$24.34	\$1102.60
0	03/31/2010		MS	\$0.00	Miscellaneous	0.00	\$24.34	\$0.00

Total Entries: 5    Hours Flagged: 46.30    Total: \$1,126.94

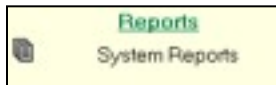
iAutoFocus -Employee Tab - Create New Labor Miscellaneous Record

Once all the entries have been verified as being correct you can click the **Print** icon to print a worksheet to provide back to the technician. You can choose to have it include a summary of time available for the work orders flagged or you can **Exclude**

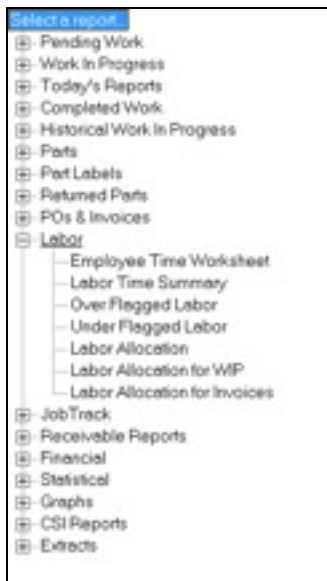
the **Service Items** from being displayed on the print out by clicking on the checkbox. To protect your payroll entries that have been verified from being modified or deleted we recommend that you click the **Pay** icon at the bottom right of the screen. This will mark the **Date Paid** field with today's date and protect those entries.

Note: Should you need to change an entry that has been marked paid you will need to have full labor privileges and you can select the employee that you want to modify then press the F10 function key then click on the date paid field of their time entries. You can now make the changes necessary. The information will automatically relock when you close the labor costing screen.

Additional reports for labor costing can be found on the **System Reports** from the main navigation tool bar and then open up the **Labor** section of the report listing.



iAutoFocus -Left navigation Bar - System Reports

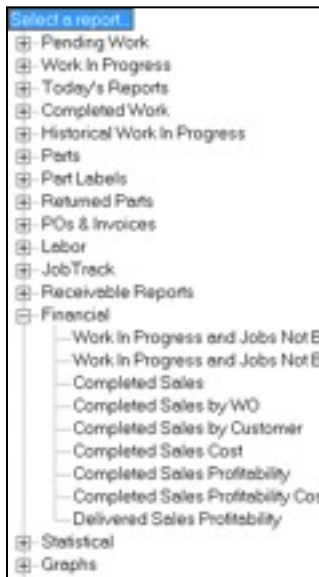


iAutoFocus -System Reports - Labor

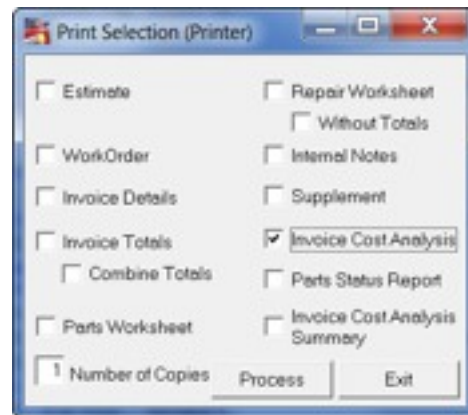
The **Employee Time Worksheet** in this section is the same as the worksheet that is found on the labor costing screen where payroll was verified. The **Labor Time Summary** is an overview of all entries for all employees for the payroll period. The **Over/**

**Under Flagged Labor** reports are useful to verify that jobs have not been closed with labor being overpaid or underpaid. The **Labor Allocation** reports are used for you in preparation of payroll if you have previously allocated labor to technicians. If you do not allocate employee times then these reports are not applicable to your shop.

With labor flagging complete the shops cost report for **Completed Sales** in the **Financial** section will display an accurate picture of profit and costs of labor, as well as the **Invoice Cost Analysis** report (accessed when you Right-Click on any particular work order and choose **Print Reports**).



iAutoFocus -System Reports -Financial



iAutoFocus -Right-Click from Work Order - Invoice Cost

## Time Clock

(See Advanced Features)

# Management

In this section you will learn simple management function which will help you track Receivables, view production Dashboards, and create Letters & Labels to help your shop run both smooth and efficient.

## Receivables

The **Receivables** heading provides a management screen with all current and aging receivables. Using this screen provides

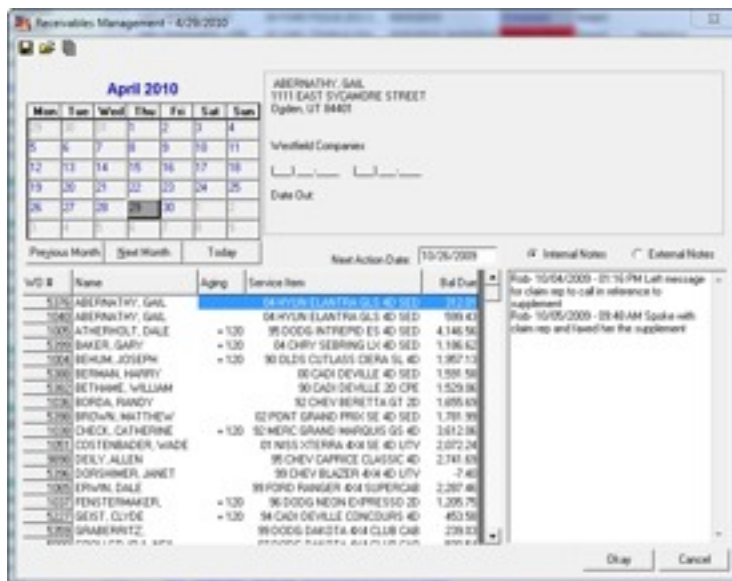


you with all the tools you need to collect monies owed by customers.

Simply click on the **Receivables** option in the Left navigation bar and the **Receivables Management** window will appear. All **Delivered** work orders with balances remaining will be listed based on the number of days entered into initial **Setup** under **Invoice Setup**. A convenient calendar lets collectors scroll past and future months to make appropriate payment arrangements with the customer.

When a customer's name is highlighted from the list, the top right section of the screen is populated with their Contact Information so you can do all your dialing from one screen. The receivables list provides the **Work Order Number**, Customer **Name**, **Aging** information (how many days past due the customer is), the **Service Item** (vehicle worked on), and the **Balance Due** on the account.

Internal and External Notes are shown and collectors can append these notes as necessary.



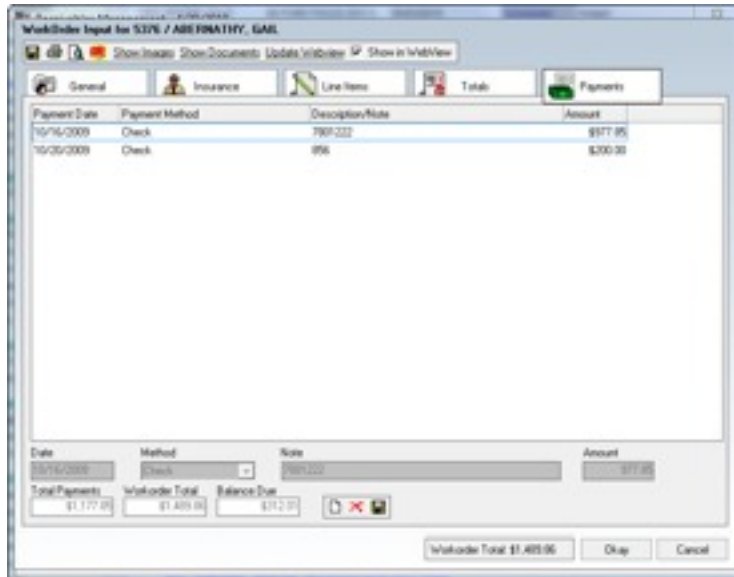
iAutoFocus -Receivables - Receivables Management Screen

Double-clicking on any name from the Receivables list will pull up the customer's **Work Order** and open to the **Payments Tab**. Collectors can easily enter and save payments and continue working the receivables list.

Once payment arrangements have been made, use the **Next Action Date** on the **Receivables** Screen to enter the date you



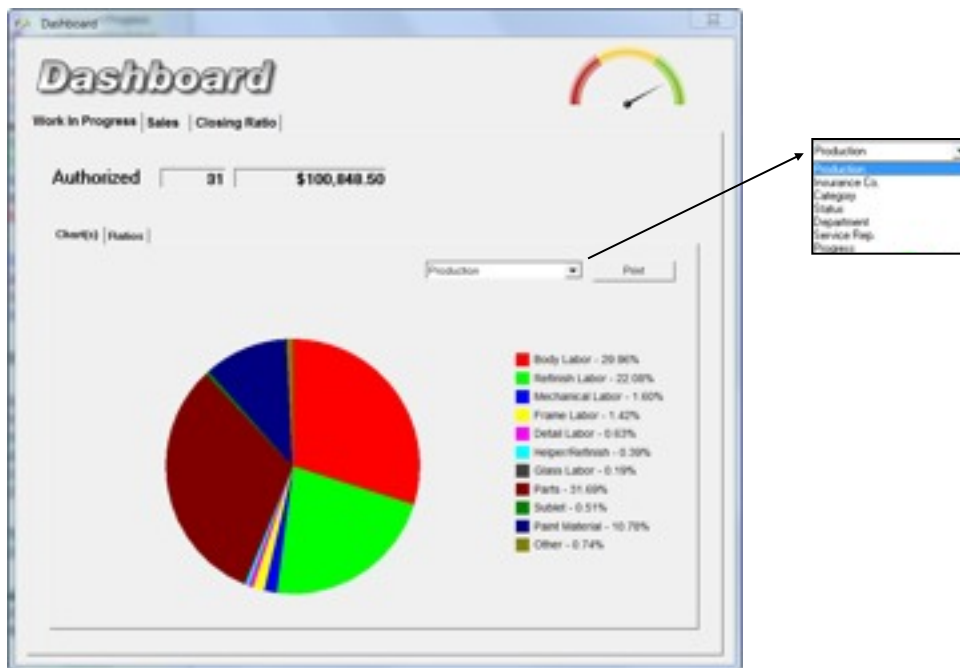
would like to follow-up on that account again. E.g. If a customer states they are going to mail a check, you may want to set the **Next Action Date** to 10 days in the future to follow up if the payment has not been received. The account will then be removed from your list for 10 days.



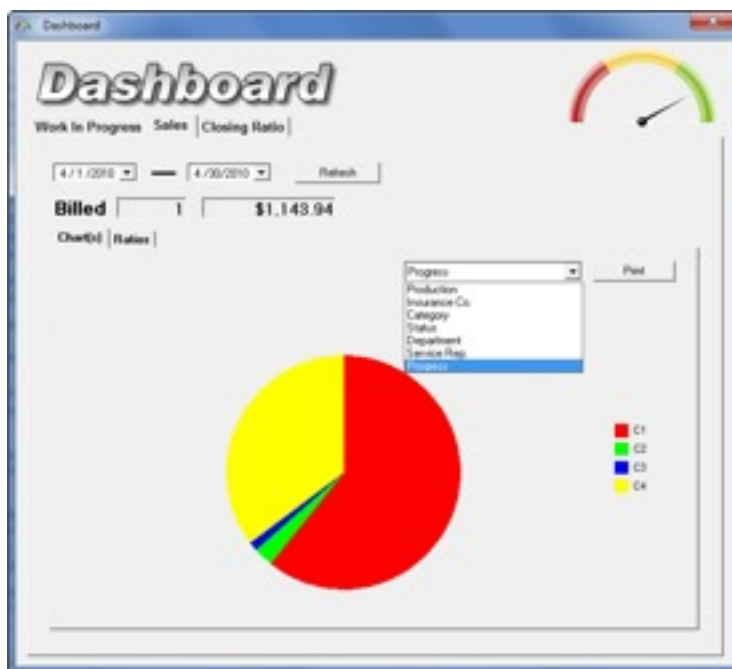
iAutoFocus -Receivables Management Screen -Work Order - Payments Tab

## Dashboard

The **Dashboard** heading displays pie charts for your Work in Progress and Sales. Different charts and ratios can be displayed and printed by changing the tabs and dropdown options on the screen.



iAutoFocus – Dashboard Screen – Work In Progress Tab

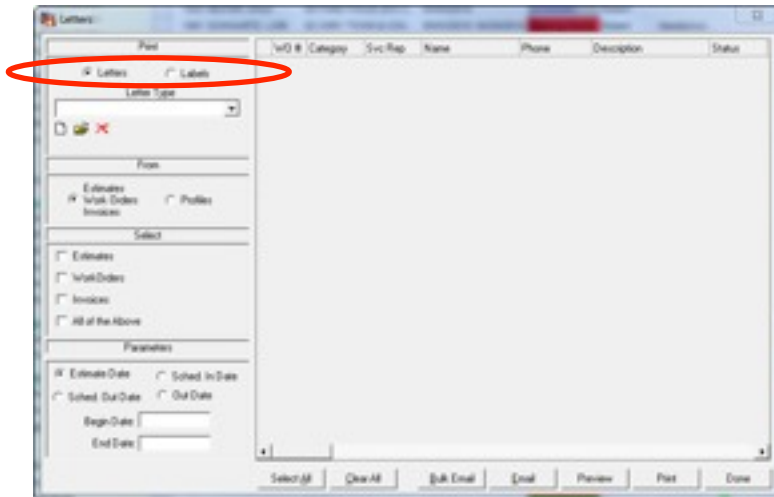


iAutoFocus – Dashboard Screen – Sales Tab

### Letters & Labels

The **Letters and Labels** screen displays options to design and store commonly used letters to email or mail to customers and insurance companies. Additionally, the ability to print envelope labels help keep you efficient and organized.

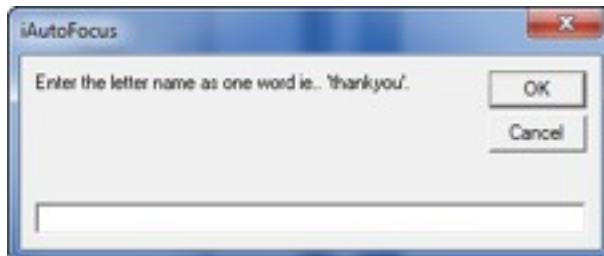
From the Left Navigation Bar, Click Letters & Label and the **Letters** Screen will appear. On the left side of the window, you can choose whether you want to work with Letters or Labels by selecting the appropriate radio button.



iAutoFocus – Letters Screen

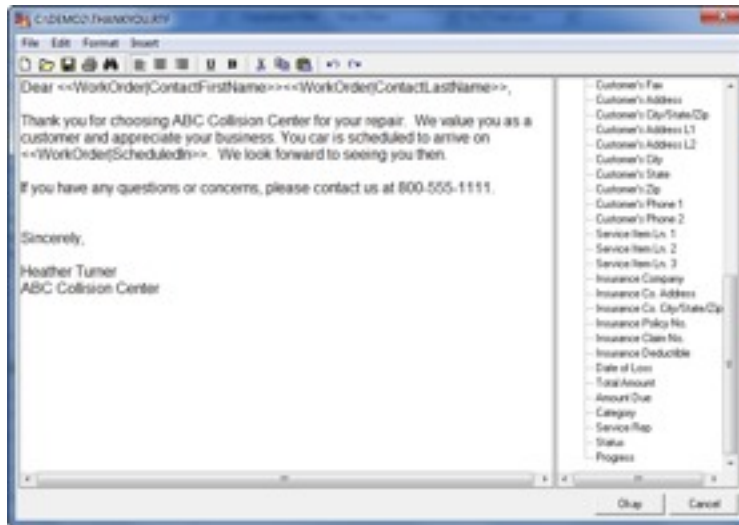
To work with Letters, select the Letter radio button then choose the letter type from the drop-down. Initially, you will need to create any commonly used letters by clicking on the **New Letter** icon (you can **Edit** any letter by selecting the letter from the list and clicking on the yellow folder).

A window will appear asking you to name the letter you are creating with one word. Enter the name of the letter and click **OK**.



iAutoFocus – Letters Screen – New Letter

A **Rich Text File (.RTF)** window will appear where you can type, edit, and save your letter. Work Order-specific fields can be selected from the right side to personalize your letters.



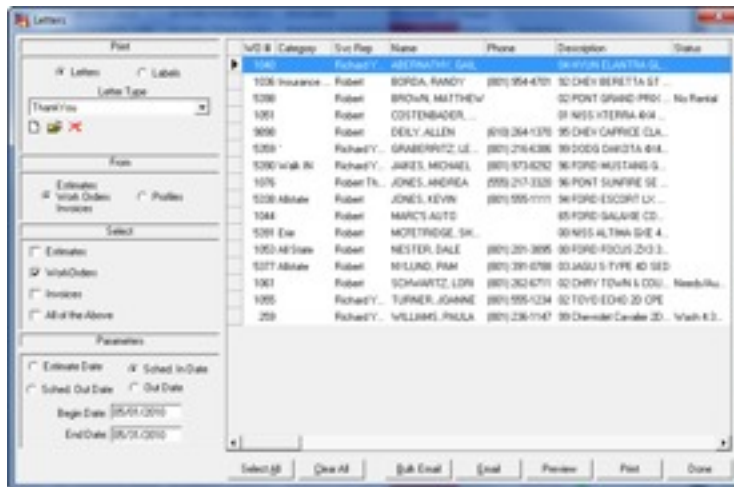
Note: We recommend creating your letter in Microsoft Word or another word processing program first. That way, you can change font styles, colors, and complete a spell check prior to copying and pasting your letter into the .RTF window.

Once your letter is finished, click **Okay** to save. In the main Letter Screen, choose the letter you just created from the drop-down.

Using the option in the **From**, **Select**, and **Parameters** boxes, determine which customer you are sending the letter to.

- **From:** In the **From** section, choose either **Estimates, Work Orders, Invoices** (iAutoFocus will pull information from **Pending Work, Work In Progress** and **Completed Work**) or **Profiles** (iAutoFocus will pull information from your **Contacts** section).
- **Select:** Choose one or more boxes in this category. When you select **Estimates, Work Orders** and **Invoices** in the **From** section, your choices in this category will be **Estimates** (Pending Work), **Work Orders** (Work In Progress), **Invoices** (Completed Work), or **All of the Above**. When you choose **Profiles** in the **From** section, your choices will be all your types of contacts; **Individuals, Businesses, Vendors, Insurance Companies, Employees, Personal, All of the Above**.

- **Parameters:** This section will only be listed when you have selected the Estimates, Work Orders, Invoices radio button. Here you will set parameters for your letter by entering a **Begin Date** and **End Date** and choosing the radio button associated with those dates; **Estimate Date**, **Scheduled Out Date**, **Scheduled In Date**, or **Out Date**.

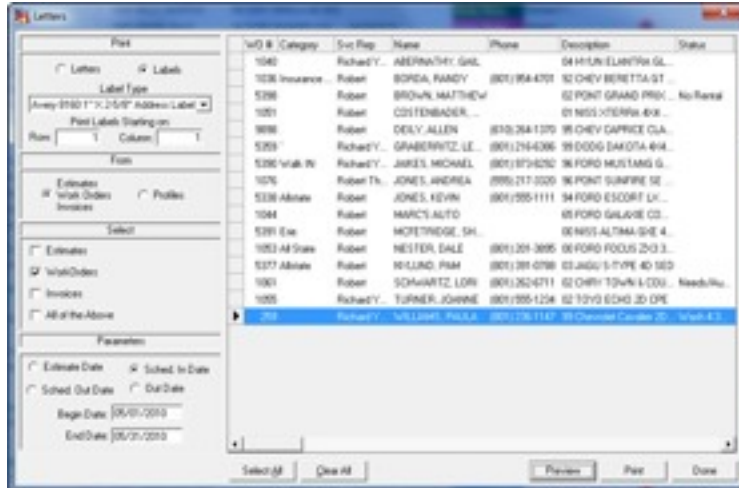


iAutoFocus – Letters Screen – ThankYou Letter

Use the buttons at the bottom of the screen to tell iAutoFocus what to do with the selected letter and list of recipients:

- **Select All:** Selects all recipients to send the letter to (can also use your Shift or Ctrl key on your keyboard to select names).
- **Clear All:** De-selects any names you have highlighted from the list.
- **Bulk Email:** If email addresses are on file, this button will automatically send the selected letter via email to the recipients without previewing.
- **Email:** If email addresses are on file, this button will bring up a preview window of the email prior to sending. If no email address exists, you will receive a pop-up to enter the email address into.
- **Preview:** Displays a replica of the selected letter with all work order specific information populated. From here you can save or print.
- **Print:** Sends the letter to all selected recipients directly to the printer.
- **Done:** Closes the window.

**Labels** are handled in a similar fashion but now instead of letters, you can print address labels for the same list of recipients. At the top of the Letter Screen, click the **Labels** radio button. A list of commonly sold labels is already loaded for you. Select the desired label type from the drop-down.




iAutoFocus - Letters Screen - Labels

Note: You can tell the printer what row or column to start printing on. E.g. If you have a sheet of half-used labels, you can tell the printer to start printing on **Row 5 Column 2** so you can continue using your inventory of labels without wasting.

## Contacts

### All Contacts

To add a new contact click on **All Contacts** on the left side then click on the **Add New** icon  on the upper left side of the screen. The picture for the Add New icon looks like a blank sheet of paper.

On the upper portion of the screen select the type of contact that you are adding (**Business, Individual, Insurance, Vendor, Employee, or Personal**) and then enter the pertinent information for that contact record.

iAutoFocus New Contact Screen

Note: When entering vendors you will notice an account info icon towards the right of the screen below the id number where you can enter account terms used when exporting to accounting interfaces before clicking on the account info tab you will need to save the contact record by clicking on apply at the lower right.

When entering an employee there is a display field which defaults to the first name but you can choose to make that the initials or employee id # if you would prefer. This field is used for displaying the technician on the main grid and the work in progress reports.

When you have completed entering information for the contact record press Apply at the lower right to save or Okay at the lower right to save and exit or the Add new icon on this screen at the upper left to save and add another contact of the same type.

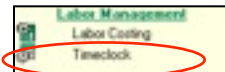
## Using iAutoFocus Advanced Features

### Labor Management

#### **Time Clock**

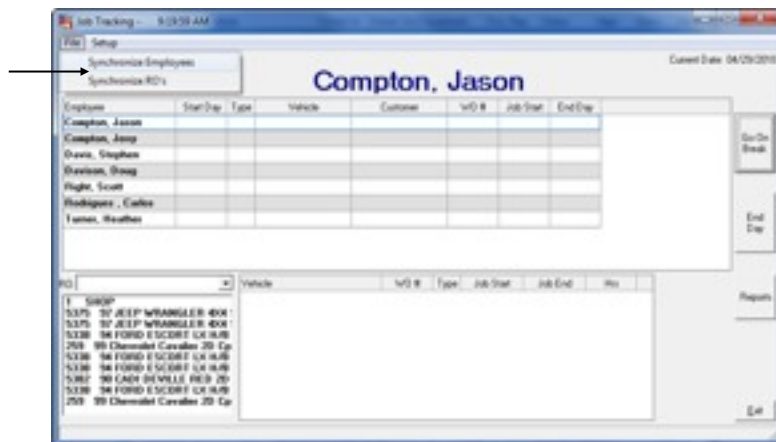
Shops that will use the time clock feature, within iAutoFocus for technicians to punch in and out of jobs, will open the time clock

from the **Left Navigation Bar** or open the time clock application from the iAutoFocus folder located in your program files folder.



iAutoFocus Left Navigation Bar – Time Clock

With the time clock open you can set it for initial use by clicking **File** at the top left of the screen and choose **Synchronize Employees** to have the employee list refresh with any new employees entered into iAutoFocus under **Contacts**.



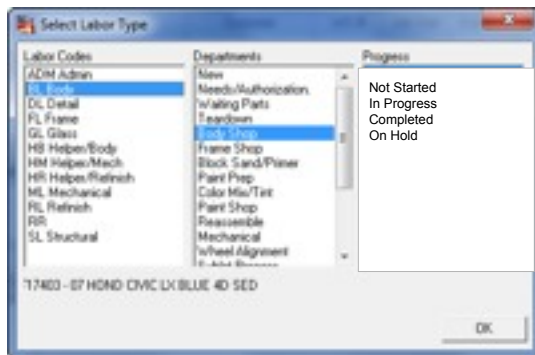
iAutoFocus Left Navigation Bar – Time Clock

Note: **Synchronize RO's** will happen automatically but if a technician is looking for a work order that doesn't appear to be available, they can try clicking that icon. Remember, a work order will not be displayed if it has not been marked **Arrived** at the shop or if it has been marked **Delivered**.

Under **Setup** you can setup descriptions for your labor types and the description that will be used to update the work order with the progress of the job to describe that labor type. The defaults are usually adequate for most shops.

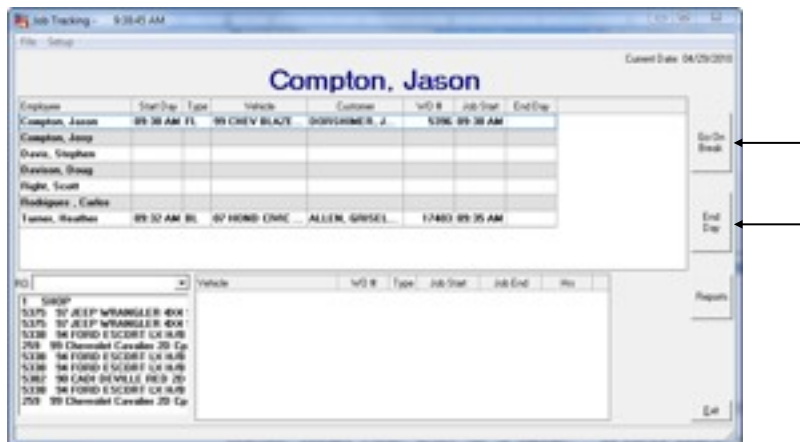
A technician will punch onto a job by selecting their name from the **Employee** list so they are **highlighted** and then typing the work order in the **RO** number box or selecting a previously entered work order that they have recently punched into. Employees are able to identify the type of labor they will be performing in the **Labor Code** column and can update the **Department** or the **Progress** of the job they are entering time on (both Labor Codes and Departments are pulled from what was entered during initial Setup).





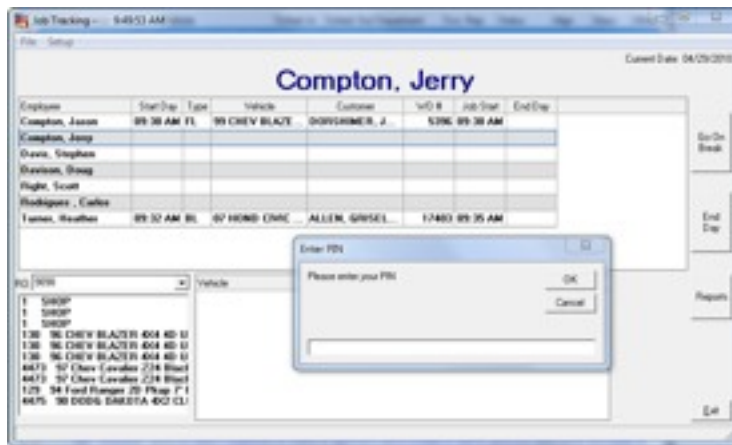
iAutoFocus – Time Clock – Select Labor Type

Their time on that job is now being recorded on the punch log. An employee cannot punch into more than one job at a time. When they punch into another job their time is stopped on the current job. If they are going to lunch or on break they can click on the **Go on Break** icon on the right side of the screen. At the end of their day they can click on the **End of Day** icon on the right side of the screen to close their time on the current job and punch out for the day.



iAutoFocus – Time Clock – Punch Log

For added security for the technicians using the time clock, a **PIN** can be entered into the **Employee Contact** information as described in Employee Setup.



iAutoFocus - Time Clock - Employee Pin

Note: Time on a work order of less than one minute will be discarded. Also, the employee has no ability to modify their time entries from within the time clock. Should you need to modify a time entry you can do that from within the **Labor Costing** screen as described above. Additional time-in and time-out entries cannot be added in the labor costing screen - only modified. If you need additional time entries we recommend that the tech punches into the job and then out a minute later so that entry can then be modified.

From within the time clock the technician has the ability to print a **Repair Worksheet** for the job he is punched into or a worksheet for all his labor assigned to him. Under the **Reports** icon in the time clock are **Job Track** reports.

Additional **Job Track** Reports are available from the Left Navigation Bar under **System Reports** as well. From here, most shops will print **the Job Hours by Employee** for the day or the pay period. The **Work Order Efficiency** reports are also useful to use to gauge the employees performance for the pay period or the month.

## Load Based Scheduler

### Scheduler Features

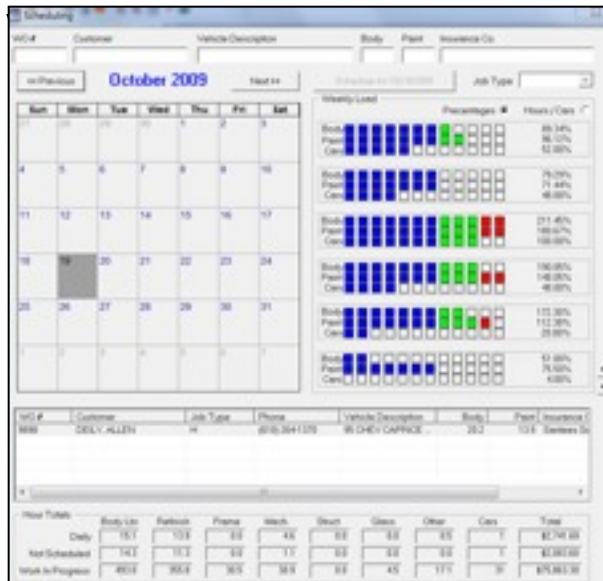
The Scheduler is the best way to schedule vehicles to maximize efficiency and productivity. During initial Setup, users will enter information about how many technicians work in each depart-

ment, how many hours they work, and how many cars per week your shop can handle. The work week is defined (what days of the week you are open), as well as holidays and employee vacation time.

Once all entries have been made in Setup for the Scheduler, you can access the scheduler by clicking on the calendar icon on the main toolbar.



The Scheduler displays the current month and day then depending on information previously entered during the setup, you can



iAutoFocus Scheduler

The search fields at the top of the scheduler allow you to enter criteria for locating a particular Work Order, Customer, Vehicle Description, Body Style, Paint Color, or even Insurance Company.



The arrows to the right of the scheduler will expand or condense the size of the scheduler and the information that is shown.

When you click on a specific date in the scheduler, all the jobs being worked on that day will populate in the portions below the

calendar indicating the job information and hours associated with that date.

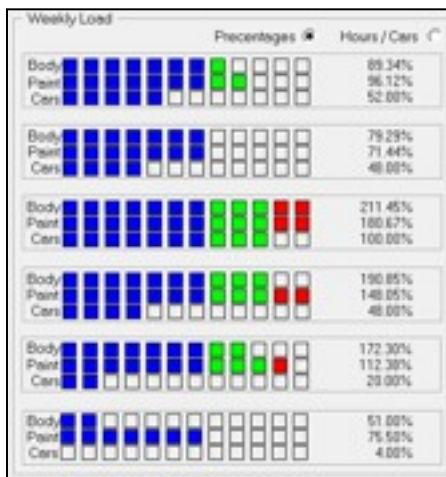
WO #	Customer	Job Type	Phone	Vehicle Description	Body	Paint	Insurance
5385	GROZIER, SUSAN	Electrical		95 MERC VILLAGE	30.6	15.5	Allstate Insr
5380	SCHMECHTEN, RICHARD	Wheels/Tires		69 CHEV CHEVELL	18.2	13.8	State Farm
5375	MATTERN, JOHN	Mechanical		97 JEEP WRANGL	32.8	14.9	Safety Insu
5318	STINE, TERRY		(801) 776-1884	02 CHRY VOYAGE	9.9	0.0	STATE FA

Hour Totals	Body Lbr.	Refinish	Frame	Mech.	Struct.	Glass	Other	Cars	Total
Daily	71.5	44.2	6.0	10.2	0.0	0.0	1.8	4	\$13,153.31
Not Scheduled	14.3	11.3	0.0	1.1	0.0	0.0	0.0	1	\$2,083.60
Work In Progress	493.0	355.8	30.5	30.9	0.0	4.5	17.1	31	\$75,863.30

iAutoFocus Scheduler - Lower Portions

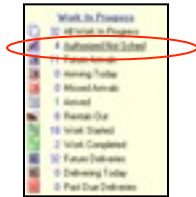
The Weekly Load Section of the Scheduler shows either **Percentages** or **Hours/Cars** (by clicking on the appropriate radio button) referring to the load capacity of **Body**, **Paint**, or **Cars**. Based on the percentage entered during setup, the colored boxes will change from **Blue** to **Green** and eventually **Red** when you are exceeding maximum capacity.



iAutoFocus Scheduler - Weekly Load Portion

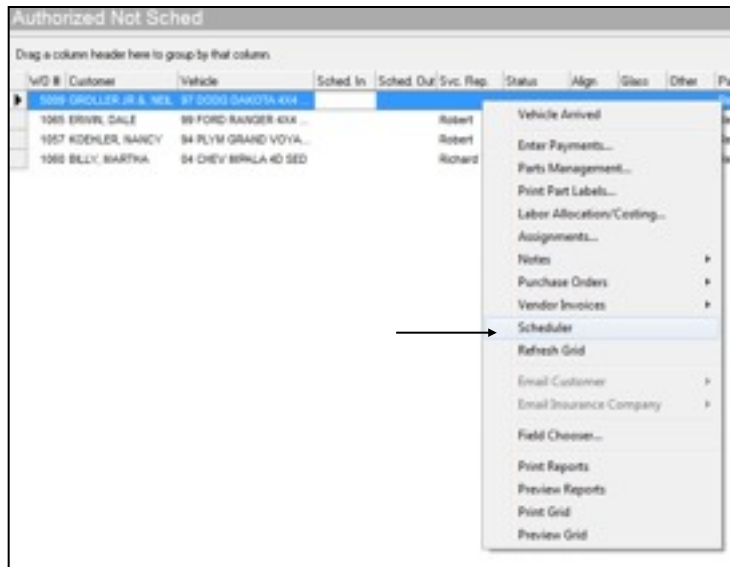
### Scheduling a Job

Under **Work In Progress**, click on **Authorized Not Scheduled** in the Left Navigation Bar. The Main Grid will display all jobs that need to be Scheduled.



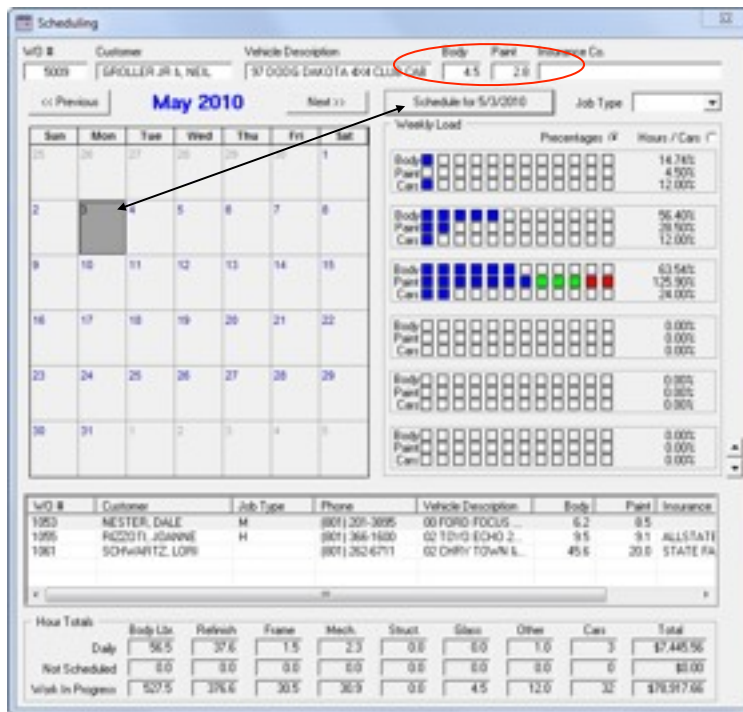
iAutoFocus – Left Navigation Bar – Authorized Not Scheduled

Highlight the job you would like to Schedule and Right-Click on the job. From the menu, choose **Scheduler** remember, you can also access the scheduler from the Toolbar in iAutoFocus by clicking on the calendar icon)..



iAutoFocus –Authorized Not Scheduled – Right Click Menu

All the Information from the job you clicked on will be populated into the Scheduler. From here you can see your work load by looking at the colored boxes and reviewing percentages. In this example, the new job being scheduled requires 4.5 hours of body work and 2.8 hours of paint. Based on that information, the user can click forward or back through days and months and choose the best time for the vehicle to arrive (whatever date you click on in the calendar will display on the **Schedule for 00/00/0000** button).



iAutoFocus -Scheduler

All jobs scheduled to come in on the date selected in the calendar will display below the calendar as well as daily **Hour Totals** and **Revenue Totals**.

Note: Remember, you can choose to view more or less of the Scheduler by using the up and down arrows on the right side of the Scheduling Window.

Once you have decided the best today to schedule the vehicle to come in, select that date in the calendar and click the **Schedule for 00/00/0000** button. The Scheduler will close and you will be returned to the **Authorized Not Scheduled** page. The job will be missing from this section as it has automatically been moved but can of course be viewed under **All Work in Progress!**

Continue scheduling the rest of your jobs in this fashion and you will always understand your shop's load capacity for every day of the year!

## QuickBooks

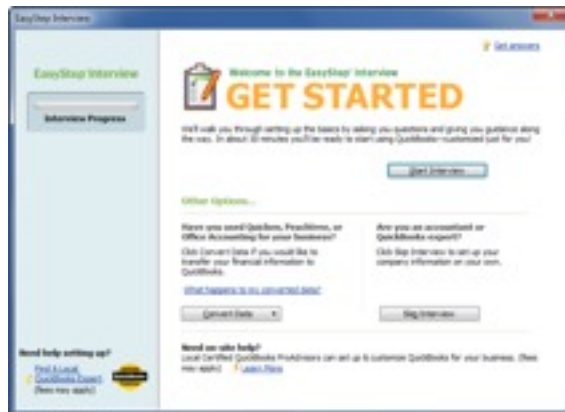
An optional, but highly recommended, supplement to iAutoFocus is to incorporate QuickBooks as your accounting program.

lautoFocus exports data directly into your QuickBooks program making your accounting process easier and more efficient. Your accountant will thank you!

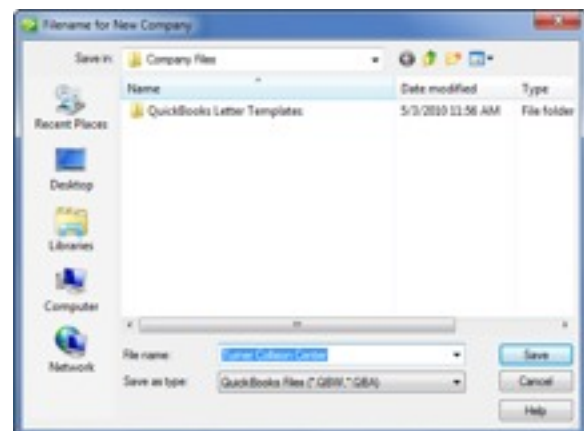
## Getting Started

New QuickBooks users will be taken through a “Getting Started” Interview which will help you set up all the required information for your company.

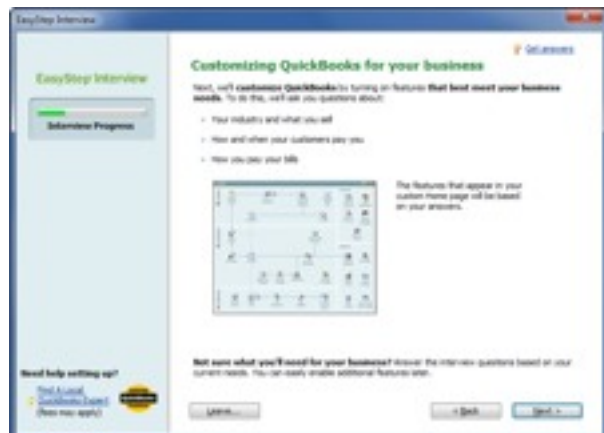
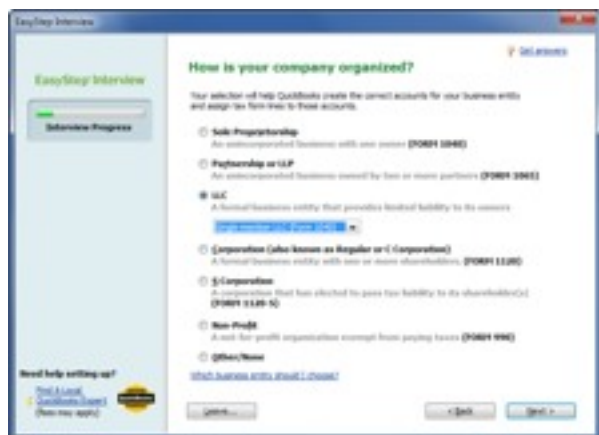
The screenshots that follow depict the EasyStep Interview in the QuickBooks Pro 2010 version.



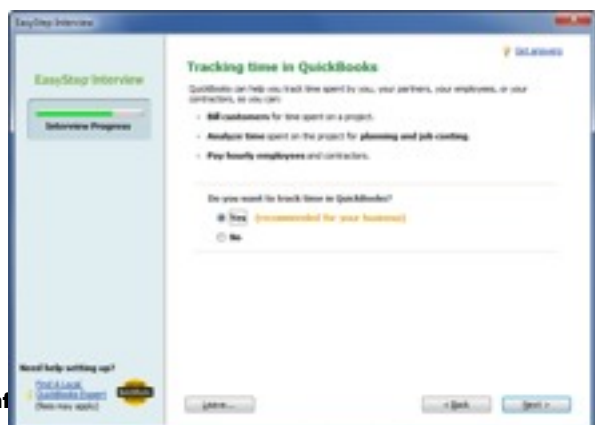
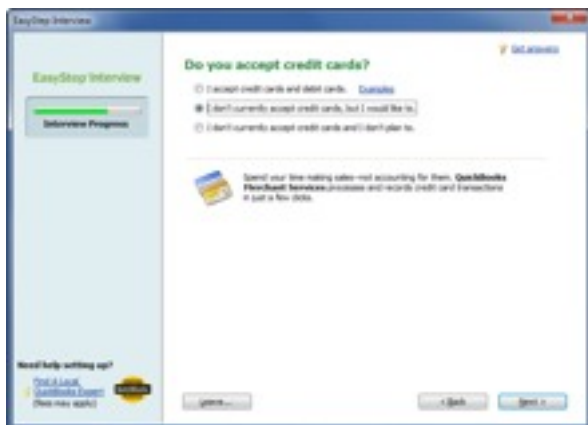
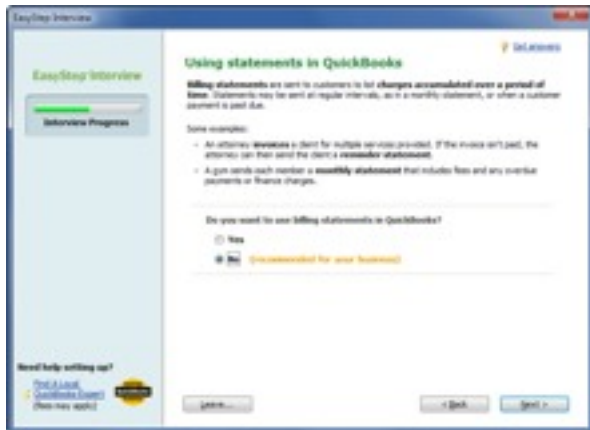
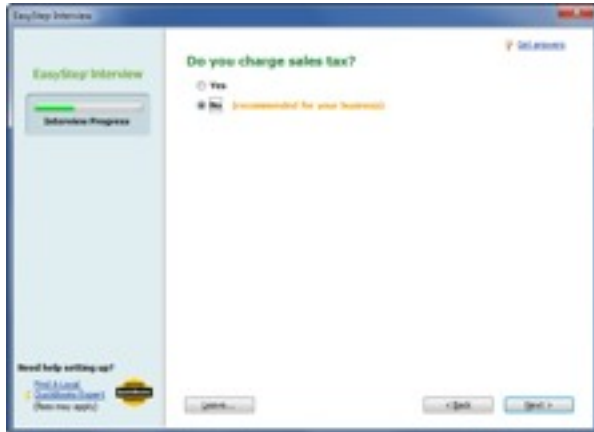
QuickBooks –Welcome to the EasyStep Interview

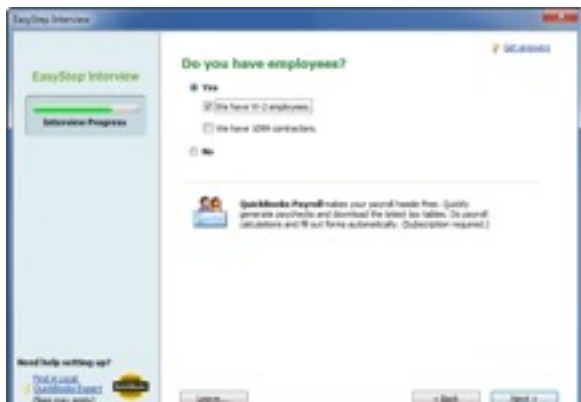
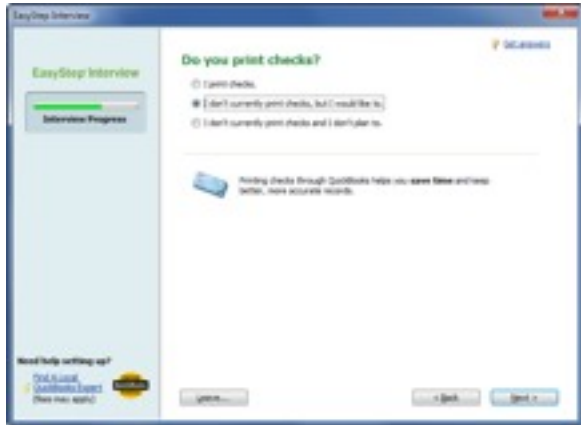


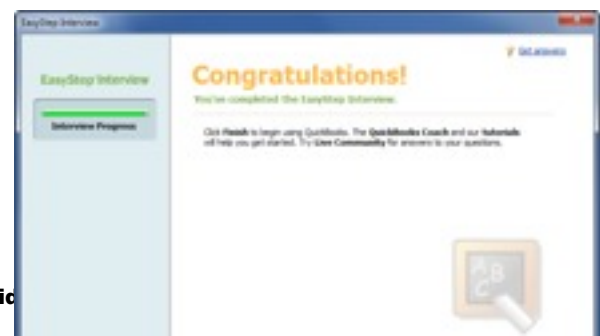
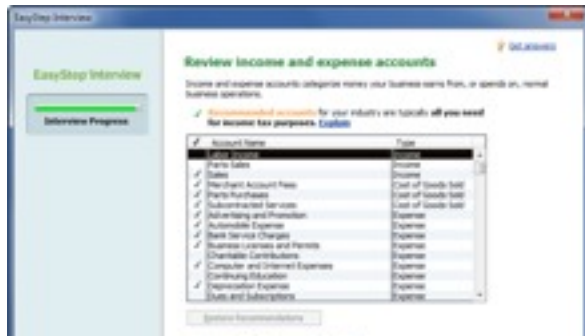
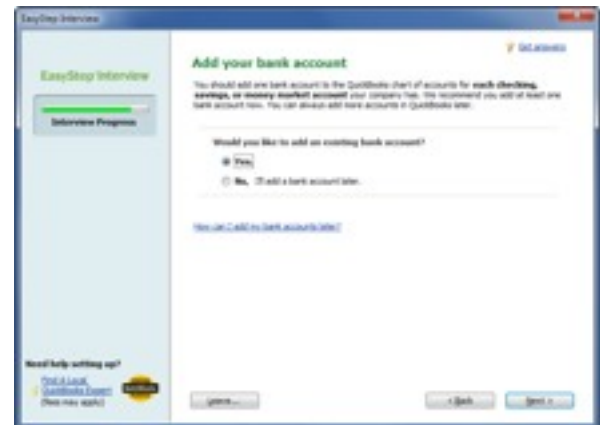
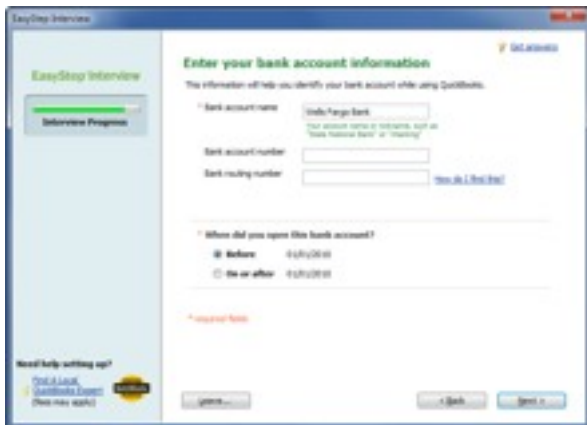
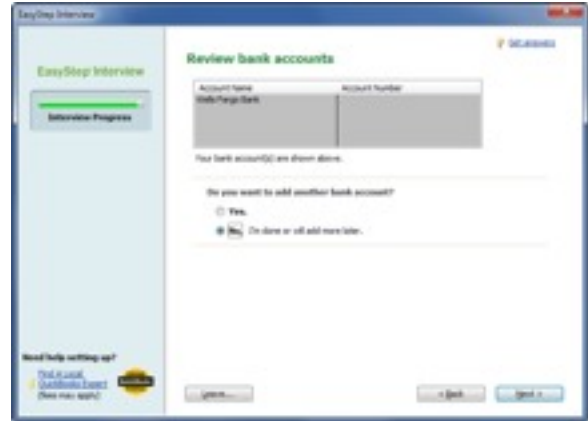
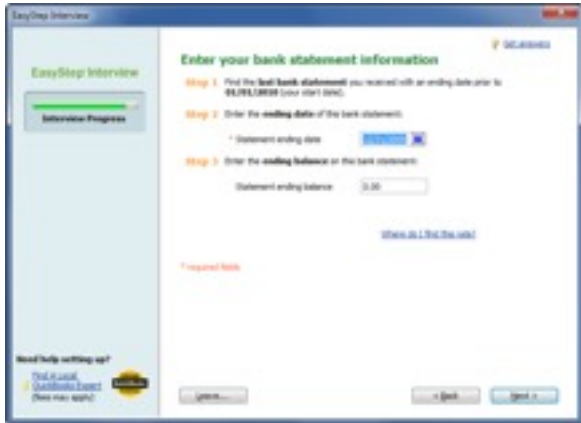












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### **Creating QuickBooks Reports**

The following QuickBooks reports need to be created and configured in QuickBooks prior to exporting any data from iAutoFocus. The following is a comprehensive list of exactly which reports you will need:

#### **Completed Sales – QB**

- Choose Customer Transaction Detail report and make the following changes:
  - Date – This month
  - Transaction Type –
    - Multiple Transaction Types
    - Invoice
    - Credit memo
  - Detail Level – Summary Only
  - Posting Status – Either
  - Template – Choose any valid template types
  
  - Header Footer – Name the report – Completed Sales – QB
  
  - Display – Unmark all except: Name, Num, Date, memo, Amount
  
  - Sort by: Number or Date
  
  - Memorize as Completed Sales – QB

#### **Payments Received – QB**

- Choose Customer transaction detail report and make the following changes:
  - Date – This month
  - Accounts – Account Receivable
  - Transaction Type – Multiple Transaction Types

- Check
- Payment
- Statement Charge

#### Header Footer – Name the report – Payments Received – QB

- Display – Unmark all except: Name, Num, Date, memo, Amount
- Group By: Payment Method
- Sort By: Date
- Memorize as Payments Received – QB

#### Unapplied Payments – QB

- Same as above report but change the following
  - Date – All
  - Paid Status – Open
  - Posting Status – Either
  - Memorize as unapplied Payments – QB

#### Accounts Receivable – QB

- Choose the Customer Balance Summary Report and make the following changes:
  - Header Footer – Report Title – Accounts Receivable – QB
  - Memorize as Accounts Receivable – QB

### **Exporting Data to Microsoft QuickBooks**

Once you have set up your company and followed the instructions on creating the proper reports in QuickBooks, you can begin to export data from iAutoFocus into QuickBooks.

Report Center

- Company Snapshot
- Memorized Reports ▶
- Process Multiple Reports
- Company & Financial ▶
- Customers & Receivables ▶
- Sales ▶
- Jobs, Time & Mileage ▶
- Vendors & Payables ▶
- Employees & Payroll ▶
- Banking ▶
- Accountant & Taxes ▶
- Budgets ▶
- List ▶
- Custom Summary Report
- Custom Transaction Detail Report
- QuickReport Ctrl+Q
- Transaction History
- Transaction Journal

**iAutoFocus - General Ledger Code Setup**

GL Codes    Export Accounts

Income Account  
Shop Income

Cost of Goods Sold Account  
Shop COGS

Accounts Receivable  
Accounts Receivable

Accounts Payable  
Accounts Payable

Deposits  
Undeposited Funds

Sales Tax Agency  
Taxation and Revenue

Class  Export Category as Class

QB Export Format: Last Name, First Name

Export Vendor Bills as Items

Load Factors:  Enable

Line Item Description	Percent
Misc. Supplies	4.00%

Taxable Applied GL Code: [Dropdown]

Non-Taxable Applied GL Code: TP - Taxable Part

**Quickbooks Operations**

Defaults    Export to QB    Okay

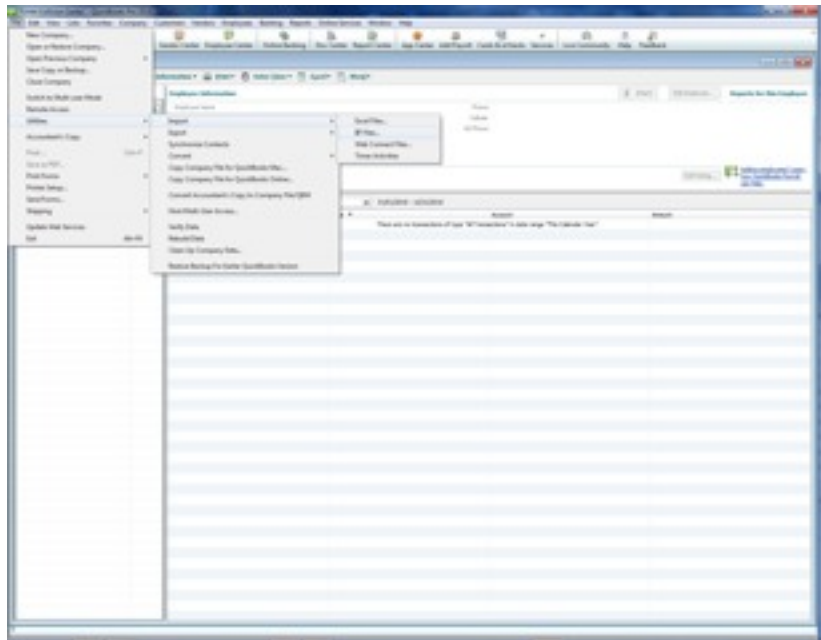
**iAutoFocus - General Ledger Code Setup**

GL Codes    Export Accounts

Code	Description	Rate	Tax Rate	Labor *	QB Income Name	QB COGS Name
TP	Taxable Part	\$0.00	7.000%	No	Parts	
NP	NonTaxable Part	\$0.00	0.000%	No	Parts	
TS	Taxable Sublet	\$0.00	7.000%	No	Sublet	
NS	NonTaxable Sublet	\$0.00	0.000%	No	Sublet	
BL	Body Labor	\$45.00	7.000%	Yes	Body Labor	
RL	Refinish Labor	\$45.00	7.000%	Yes	Refinish Labor	
ML	Mechanical Labor	\$50.00	7.000%	Yes	Mechanical Labor	
FL	Frame Labor	\$50.00	7.000%	Yes	Frame Labor	
GL	Glass Labor	\$45.00	7.000%	Yes	Glass Labor	
SL	Structural Labor	\$45.00	7.000%	Yes	Structural Labor	
TW	Towing	\$0.00	0.000%	No	Towing	

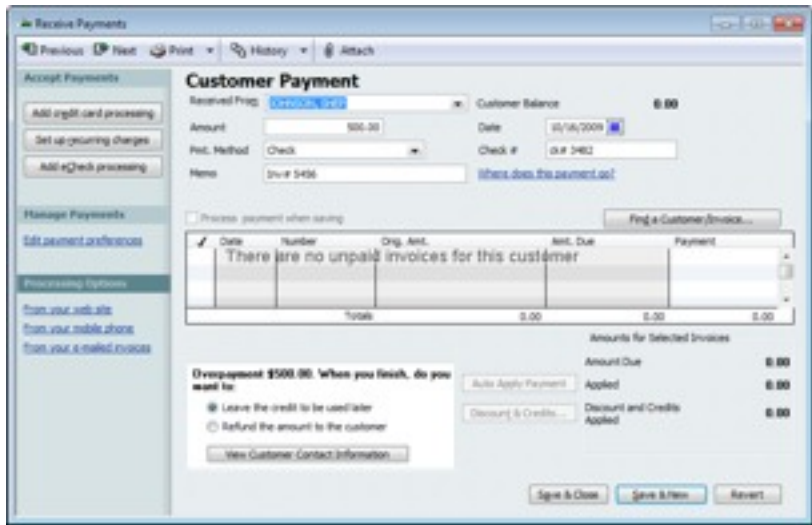
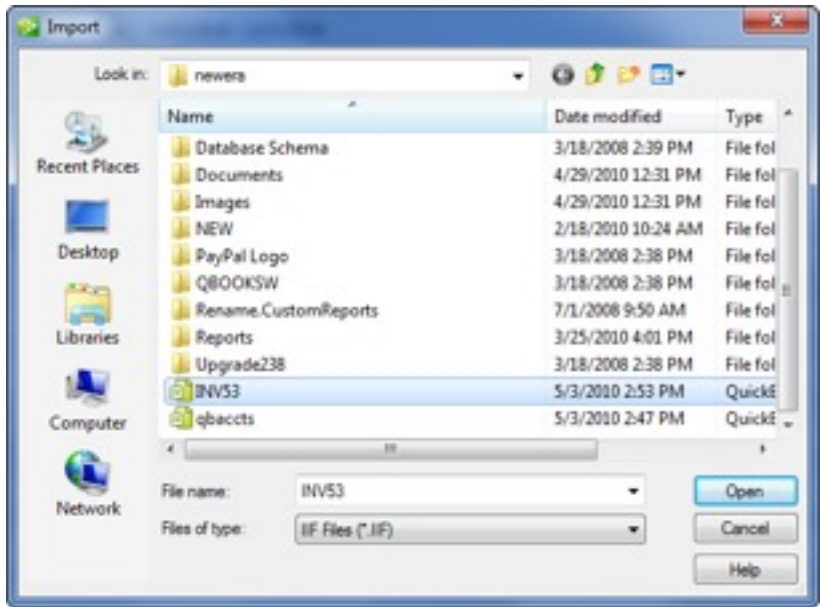
\* - Included in Labor Costing (If QB COGS Name blank QB Income Name assumed)

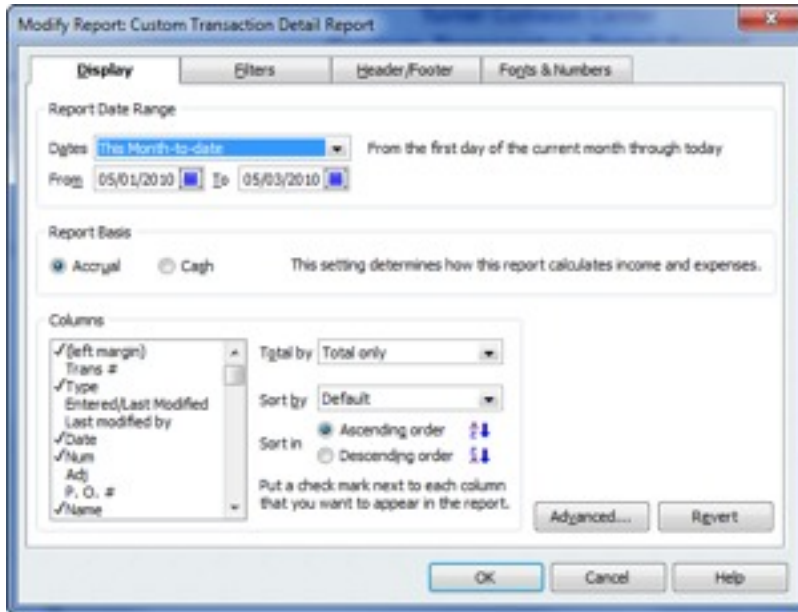
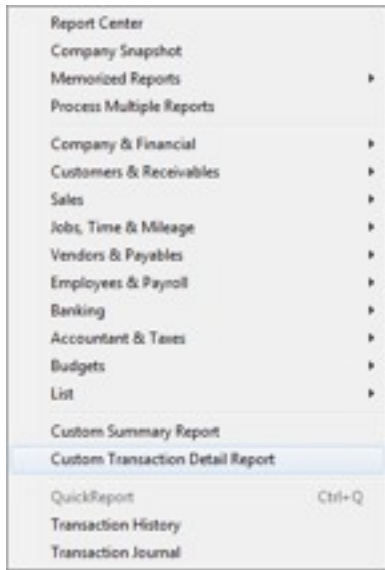
Defaults    Export to QB    Okay











# WebView

## How to Upload Photos to Your Website

First open a work order. Check the box **Show in WebView**. Make sure you are on **Date Info** radio button has been selected and that the **Authorized** and **Arrive at Shop** boxes have been checked. iAutoFocus now knows to update this particular Work Order on your website.

WorkOrder Input for 1855 / TURNER, JOANNE

Show Images  Show Documents  Update/Info  Show in WebView

General  Insurance  Line Items  Totals  Payments

Customer Information: Select Contact  Tax Exempt  
 Title: First JOANNE Last TURNER  
 Company:  
 Address: 721 GREEN STREET  
 City: Anytown State: UT Zip: 84401  
 Phone 1: (801) 555-1234 Phone 2: (801) 555-5555  
 Email:

WorkOrder: Estimate Written: 4/29/2010 Assigned: 4/29/2010 Inspected: 4/29/2010  
 Authorized:  16/24/2009 Scheduled In: 5/3/2010 Arrived at Shop:  4/29/2010  
 Rental Start: 4/29/2010 Work Started: 4/29/2010 Work Completed: 4/29/2010  
 Scheduled Out: 4/29/2010 Delivered: 4/29/2010 Billed:

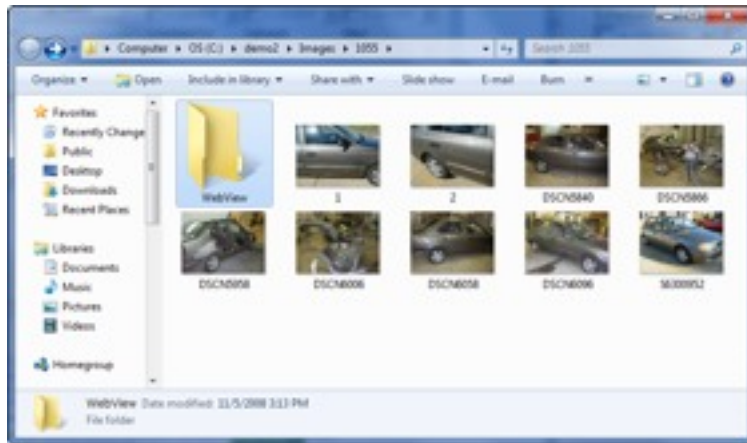
Vehicle Information:  
 Year: 02 Make: TOYOTA Model: ECHO Style: 2D CRE VIN: UZ3C25G22M666666  
 Plate State: UT Plate Number: 923 WY2 Miles In: 41375 Out: Engine: 4-1.5L FI  
 # Tones: 1 # Stages: 2 Color: RED Paint Cd: Tax Cd: Condition:

Notes & Options:  
 Select Time Stamp:  Internal  External  Options  WebView Customer  WebView Insurance

Workorder Total: \$1,241.34

iAutoFocus -Work Order - Date Info

Once you have verified all the right information has been checked, click on the link to **Show Images** link at the top of the window. This defaults to a file location with a folder entitled **WebView**. This folder is where you want to store all images of the vehicle pertaining to this Work Order. Either copy and paste, drag, or otherwise move pictures you can uploaded from your camera INTO this folder (note the below pictures are BY the WebView folder but must be moved into the folder for the website to be updated accurately).



iAutoFocus –Work Order – Show Images Link – WebView Folder

Once you have the desired pictures in the folder, click the red **X** in the top right corner of that window to close out the window and you will be back to the Work Order.

To modify notes for the customer to view on WebView, you can simply click on the radio button above the **Notes & Options** section of the Work Order labeled **WebView Customer Notes** and enter notes EXACTLY as you want the customer to see them.

Note: You can also Right-click on the Work Order from the Main Grid, hover over **Notes**, then choose **Modify WebView Customer Notes** to add notes to WebView.

Once you are finished adding images and notes to update WebView, click the **Okay** button at the bottom of the work order to save and tell iAutoFocus you are ready to update WebView. WebView updates automatically every hour. Any new information will be loaded to your website for your customer's to see!

Note: The **Update WebView** link is a placeholder for now as is not functional. The **Okay** button is the only button you need to successfully update WebView.

## Menu Searches & Sorts

To locate a record select the desired location of the record on the Left Navigation Bar. On the upper portion of the screen you will notice a **Search** box where you can type the customers first or last name, vehicle information, phone numbers, or you can use the # sign and the work order number, then click **Search** and the records displayed will be refined to those matching the criteria entered.

If you know the Contact ID number or Work Order Number you can type it in the box at the upper right labeled **WO #** and that will search and open the file number entered. This option is not available when viewing Pending Work. In addition, while viewing Work in Progress, you can search for departments within a range by using the **Department From** and **To** filter boxes.

Note: Searches will not function in Work in Progress for files that do not have a Department set because the Department search is triggered at the same time other searches are being made.

On the title bar for each selection displayed are the field titles for the items displayed. You can click on any column heading to sort that search by the column desired. If you click the same column heading a second time then it will do a reverse order sort. You can also reposition the column headings displayed by dragging the column heading to the appropriate position where you want it displayed.

Note: Depending on the size of your monitor, additional fields might be available further to the right of the screen. Make sure to use the scroll bar to view all the available columns.

These columns can be placed in view by dragging and holding toward the left of the title bar until the screen begins to move back toward the left. The column positions that you move and the sort order you select will be remembered for your user login.

For the records that are displayed on the screen you can click onto certain fields and change the contents without having to open the record. This is convenient when you need to update the file status or dates for multiple records. You can also open the highlighted file when double clicking onto a field that is not editable from the grid or the arrow that is on the left of the selected line. Additional operations might be available by right clicking on the highlighted line. This is to help you accomplish necessary tasks without having to open the record and find the desired area within the file.

## Enter an Unlocking Key

An **Unlocking Key** is used to track your iAutoFocus subscription or purchase options. Periodically (usually twice a year), iAutoFo-

cus will prompt you to enter an unlocking key in order to keep using the product. Unlocking keys are faxed automatically to users with a support plan. If your system informs you that your unlocking key will expire soon, please contact NewEra Software's technical support line to obtain a new unlocking key.

To enter a new Unlocking Key, Click on Help...Enter new Unlocking Key. Type in the Unlocking Key exactly as it is displayed on your Unlocking Key form. Please remember that the Unlocking Key is Case-Sensitive. After you have entered the Unlocking Key, Click on Okay. iAutoFocus will inform you if you correctly entered the Unlocking Key.