ClipLizard ®

Materials Manager Lite™ User Manual
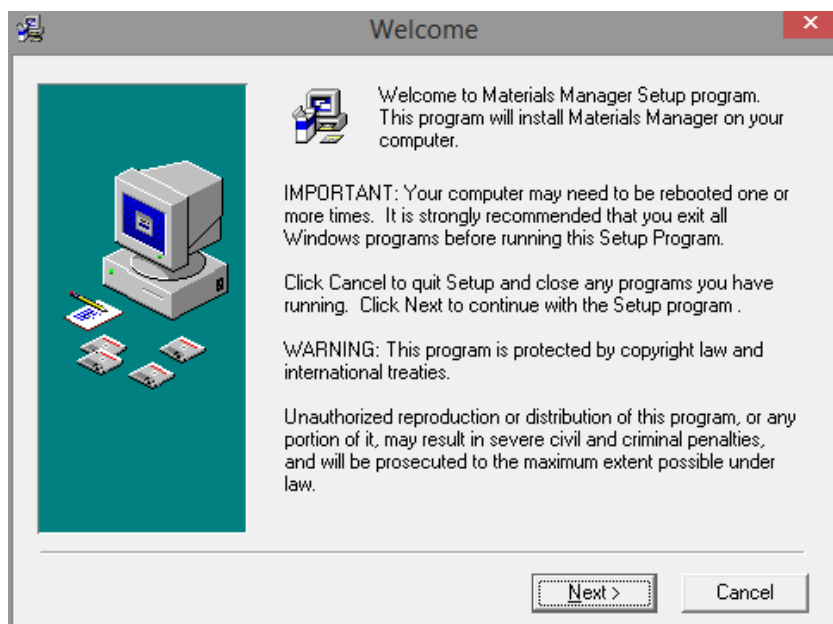
# Materials Manager Lite™ User Manual

Getting Started

Installing Materials Manager Lite™

After clicking on the executable to start the installation, you will be prompted with a "Welcome to Materials Manager™ Setup" wizard. Click the **Next** button to continue.
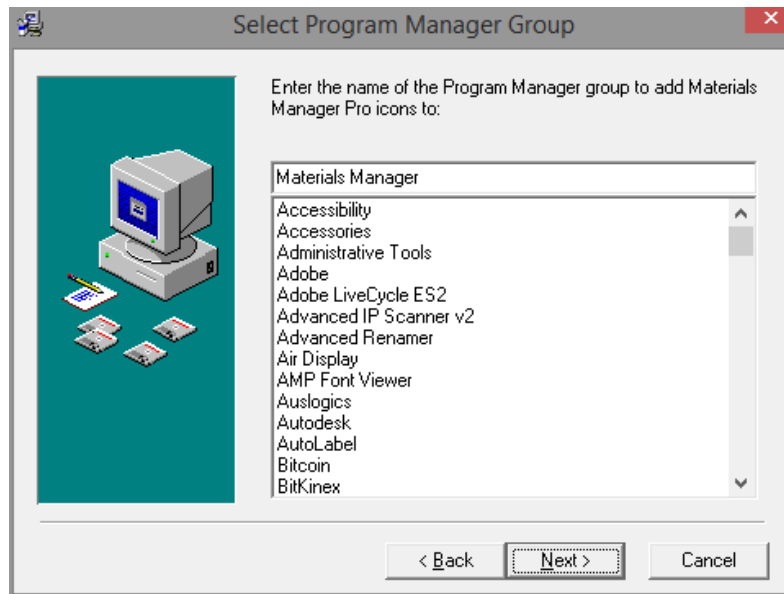

After clicking next, you are presented with the option to choose an installation directory. We recommend the default provided location.
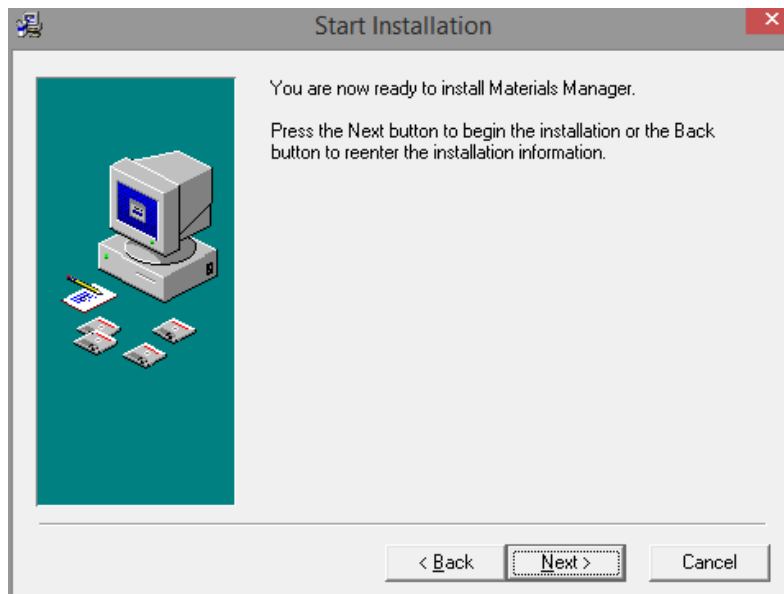
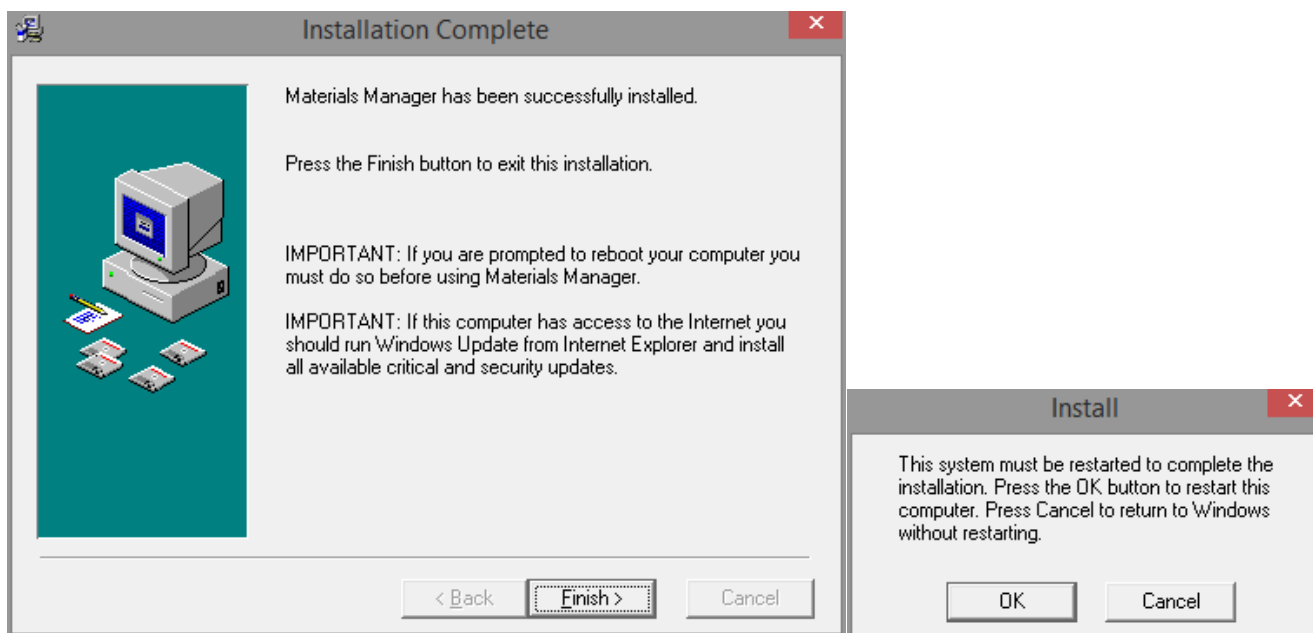**64 bit PC's will install to Program Files (x86) by default**
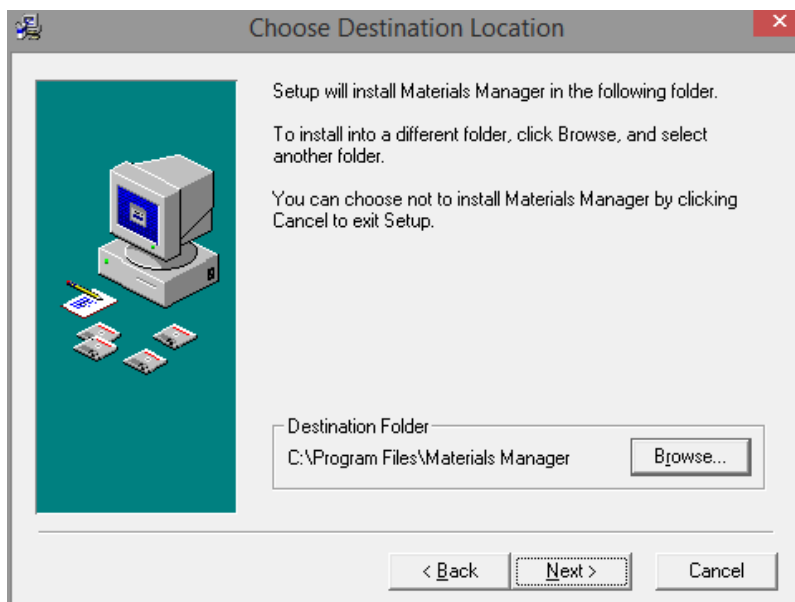
Here you are prompted with the option to select a Program Manager Group, again, the defaults provided are recommended.


Click the **Next** button upon to perform the installation.

After installation is complete, click the **Finish** button. You will be prompted to restart your PC.

Upon opening Materials Manager Lite™ for the first time, you will be prompted to review and accept the Materials Manager™ License Agreement. After reviewing the license terms, if you agree, click the checkbox at the bottom left indicating so, and then click **Continue**.
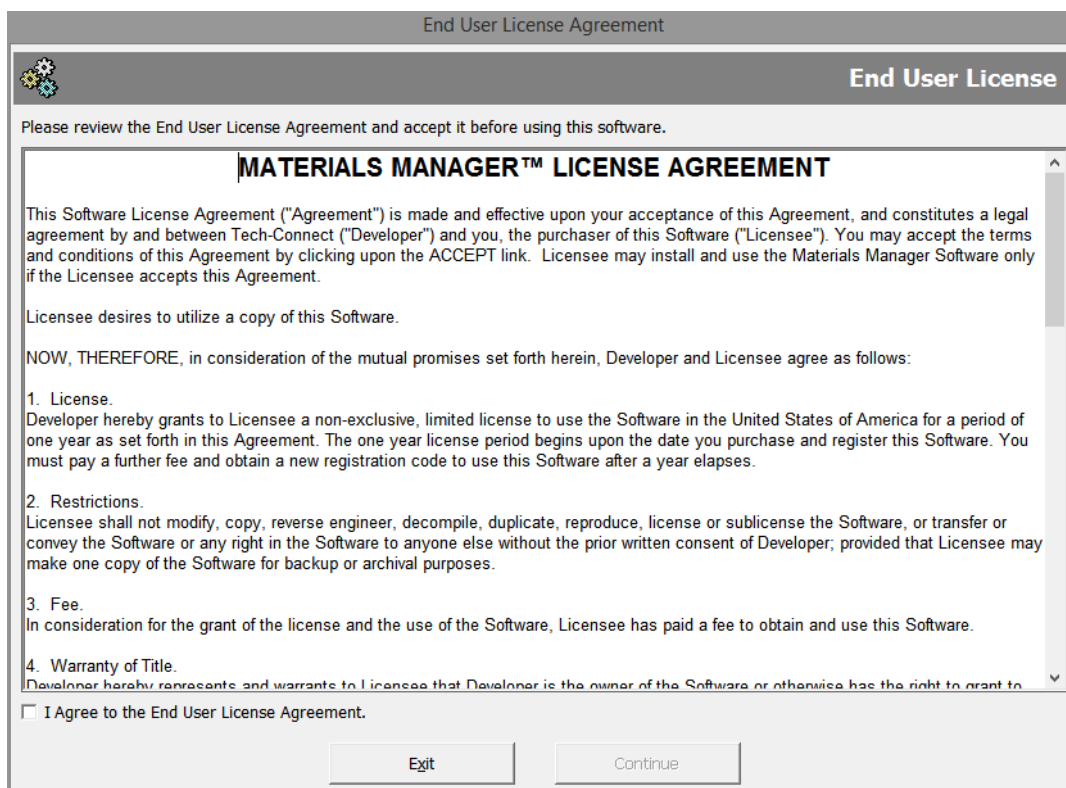
Registering Materials Manager Lite™

By default, Materials Manager Lite™ installs as a 30 day fully functional demo. To use Materials Manager Lite™ beyond this 30 day period you will need to purchase an annually renewable registration. Provide the following information to your jobber to be submitted to ClipLizard Systems® for the registration process.

The information you provide is what will be printed on your Invoices

Registration Information:
Company Name:
Street Address:
City:
State:
Zip/Postal:
Phone:
*Fax:
*Email:
(* Fields optional)

You will then receive a registration in similar format with an Expiration Date and Registration Key at the bottom. This key will need to be entered into Materials Manager Lite™ to unlock the software.

To enter your new registration go to **Tools** then **Registration.**

Enter your registration **exactly** as it is sent to you in the registration window then click **Save Registration.** The Registration Key will be hidden after registration is saved.
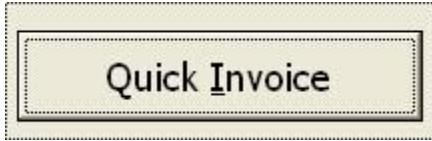
Navigating Materials Manager Lite™

When you first enter the Materials Manager Lite™ software, you will notice options on the main menu and the tool bar.
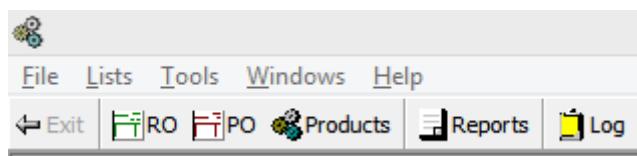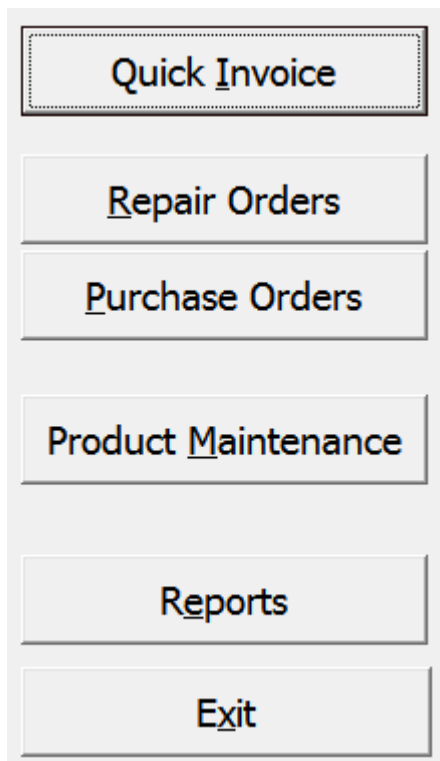
Navigating the Main Menu

The **Quick Invoice** button gives technician's an easy way to quickly enter a repair order.

Quick Invoice

The **Repair Orders** button allows for technicians to manage multiple repair orders and to create new repair orders from an easy to use interface.

Repair Orders

The **Purchase Orders** button allows for the creating new purchase orders.

Purchase Orders

The **Product Maintenance** button allows you to manage existing products or to create new products.

Product Maintenance

The **Reports** button gives you access to reports

Reports

The **Exit** button exits the software.

Exit

Navigating the Toolbar

The **Lists** menu allows you to manage Repair Orders, Purchase Orders, Products, Classes, Technicians, and Usage Locations.
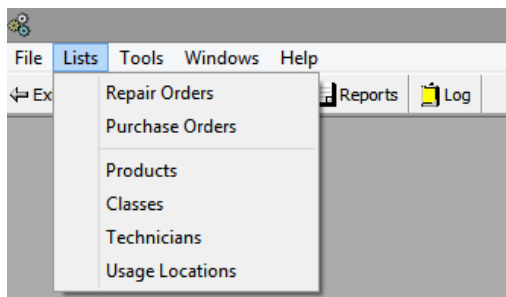

The **Tools** menu allows you to view Reports, Program Log, Repair or Recovery of the database, perform a Quick Backup or Restore of the database, to Configure Scanners, manage system options or update your Registration.
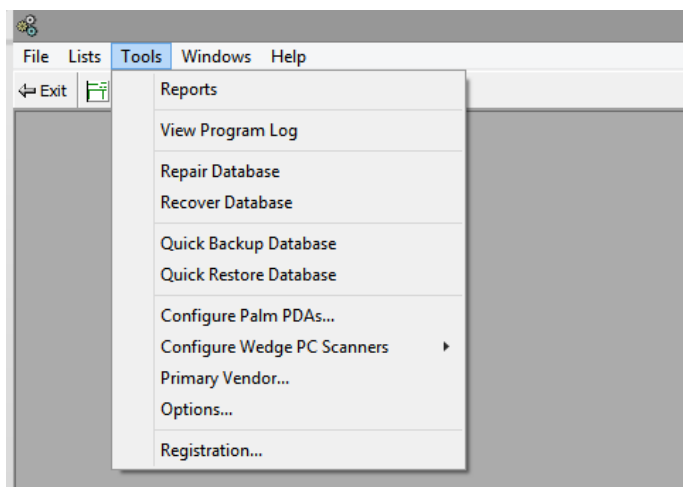
The **Windows** menu allows you to close all open windows
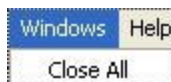
The **Help** menu allows you to find additional help on the Web or view information about the software and your company.
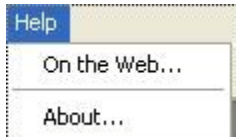
The **About** section will show you the current version of the software

Viewing the **Program Log** will provide an abundance of useful information about the system including Errors and Warnings. Errors and Warnings can be useful in troubleshooting if an error does occur.
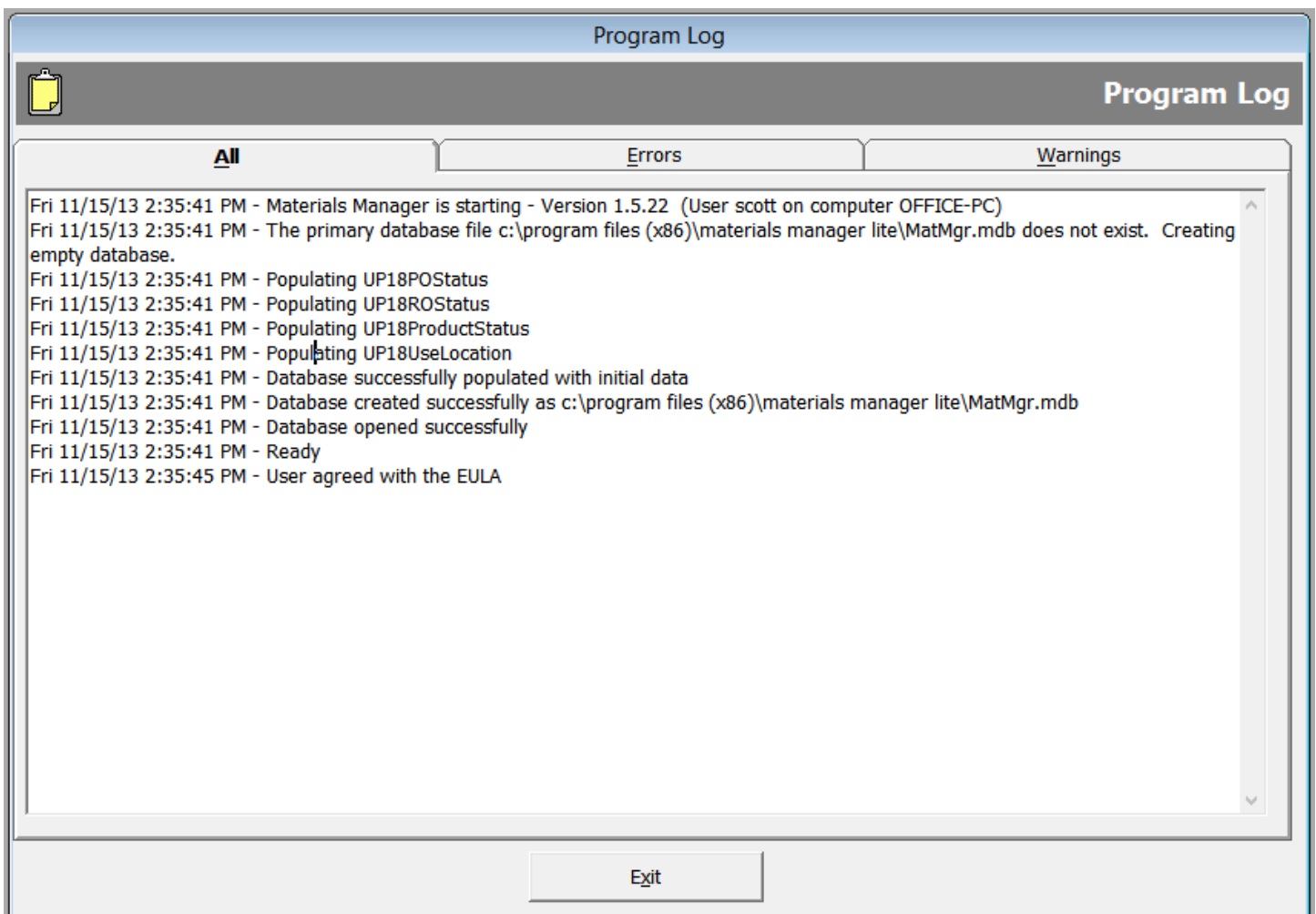
The **Options** window allows you to set various systems options.
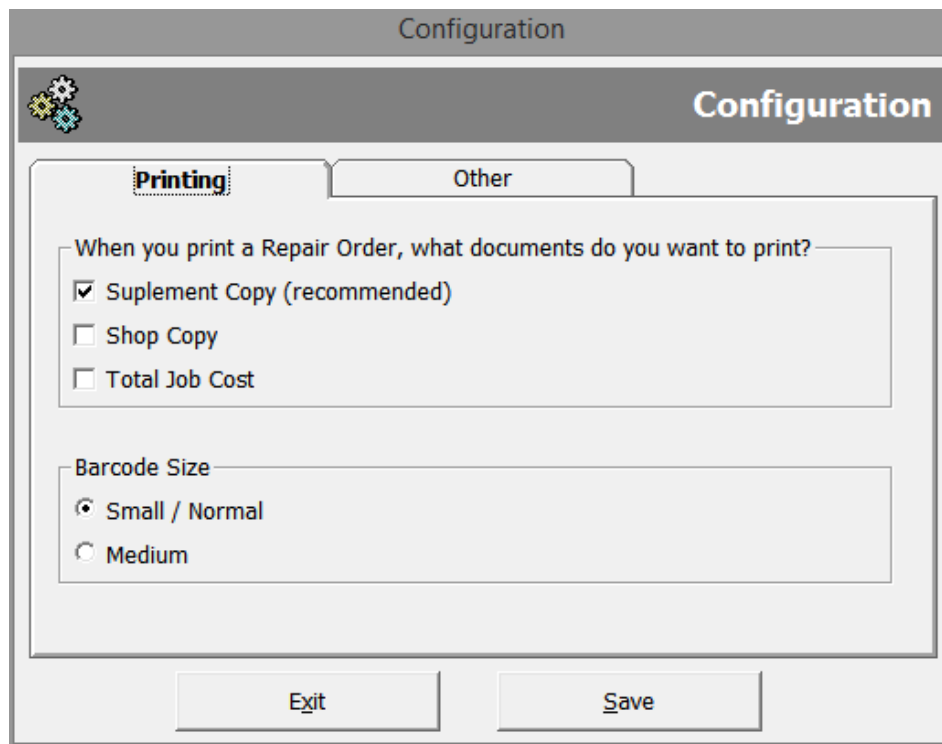
When printing a Repair Order, this section give you the choice of who copies you wish to print.

Supplement Copy:
- Default copy printed.
- Printed as "Job Ticket/Invoice"
- Provides Items used, Qty, Description, Technician ID, Location Used, List Price and Extended Price.

Shop Copy:
- For internal use
- Printed as "Shop Copy"
- Provides Items used, Qty, Description, Technician ID, Location Used, **Cost** and Extended **Cost.**

Total Job Cost:
- Typically used as an extra copy for internal records
- Printed as "Job Cost"
- Provides same information as Supplement Copy above.

Barcode Size
Effects how barcodes are printed on labels and at the bottom of Invoices. Small/Normal is default and typically recommended.

Extended Logging (Other Tab)
Provides more detail in the Program Log for diagnostic purposes. Disabled by default but useful for troubleshooting.

Managing Materials Manager™

Managing Technicians

All major functions of Materials Manager Lite™ require a login by the technician performing the function.

To add a technician, go to **Lists** and **Technicians.**
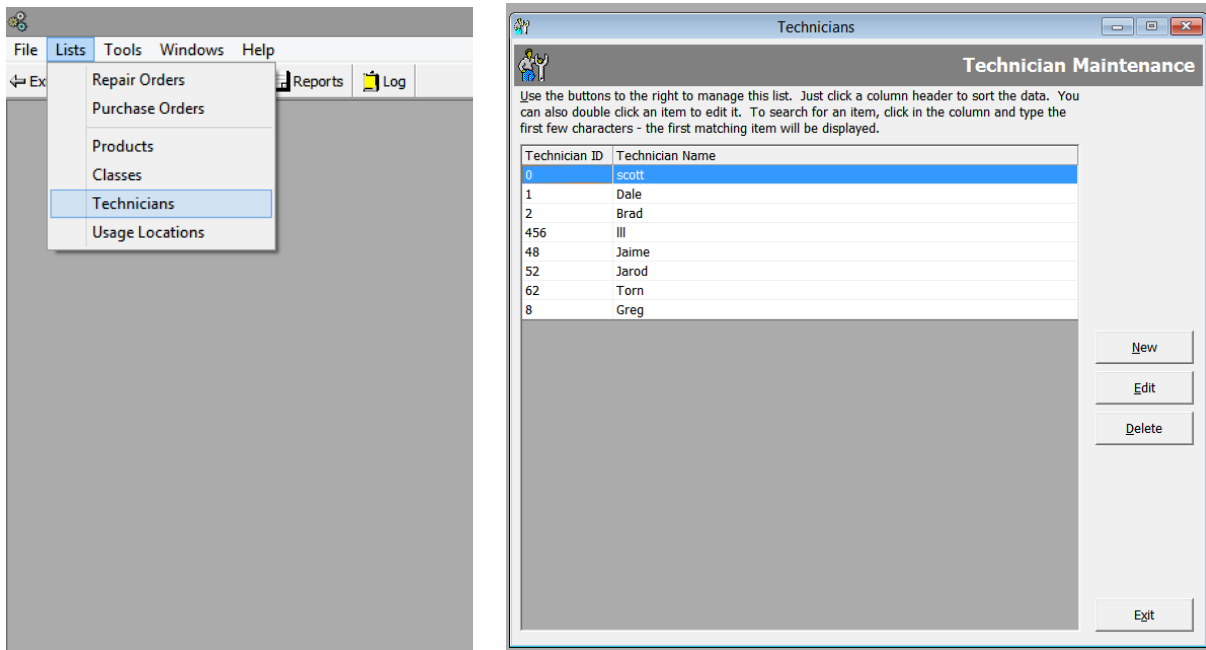
Click on **New** or **Edit** to change an existing Technician.

The Technician ID should be a number, and the Description the name of the technician or department.

Setting Your Primary Vendor

To set your Primary Vendor, click on **Tools**, then **Primary Vendor**. Enter your vendor's information and click **Save**.
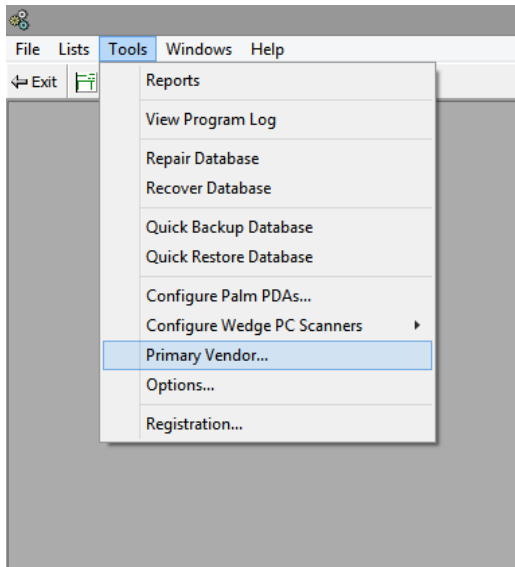
Managing Classes

Classes are essentially containers that products are placed into and are used to aid in reporting product usage. To manage product classes, click on **Lists, Classes**.
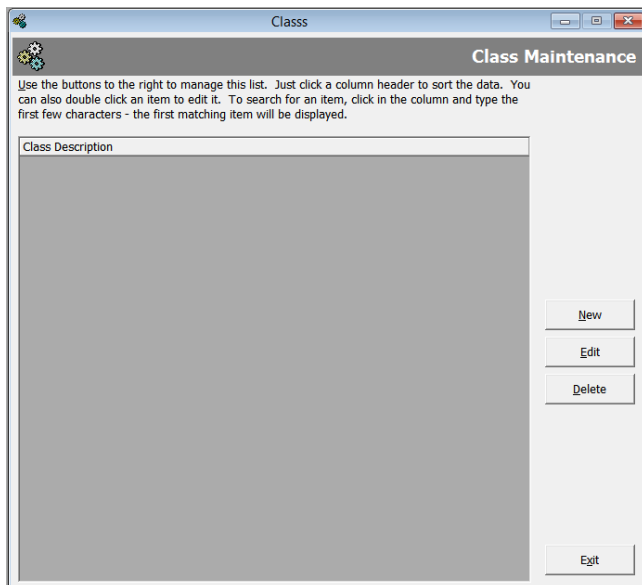
Enter a name for the new product class and click **Save.**

Managing Products

To manage products, click on the **Product Maintenance** button from the main menu.

Product Maintenance

The Product Maintenance main menu appears. From here, you can create new parts, edit existing parts, delete parts, and duplicate parts. You can also print labels or import existing products
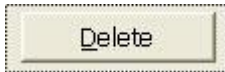
The **New** button creates a new part.
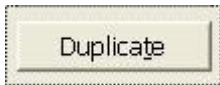
[New]

The **Edit** button edits an existing part.

[Edit]

The **Delete** button will delete a part.

[Delete]

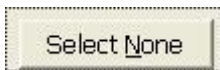The **Duplicate** button creates a duplicate part. You will still be required to assign a unique part ID.

[Duplicate]

The **Find** button allows you to enter a search phrase for parts.

[Find]

The **Select All** button selects all parts.
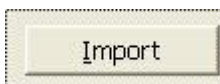
[Select All]

The **Select None** button deselects all parts

[Select None]

The **Print Labels** button will walk you through printing barcode labels for inventory control

[Print Labels]

The **Import** button allows you to import products into the database. This should only be done by a trained Materials Manager technician.
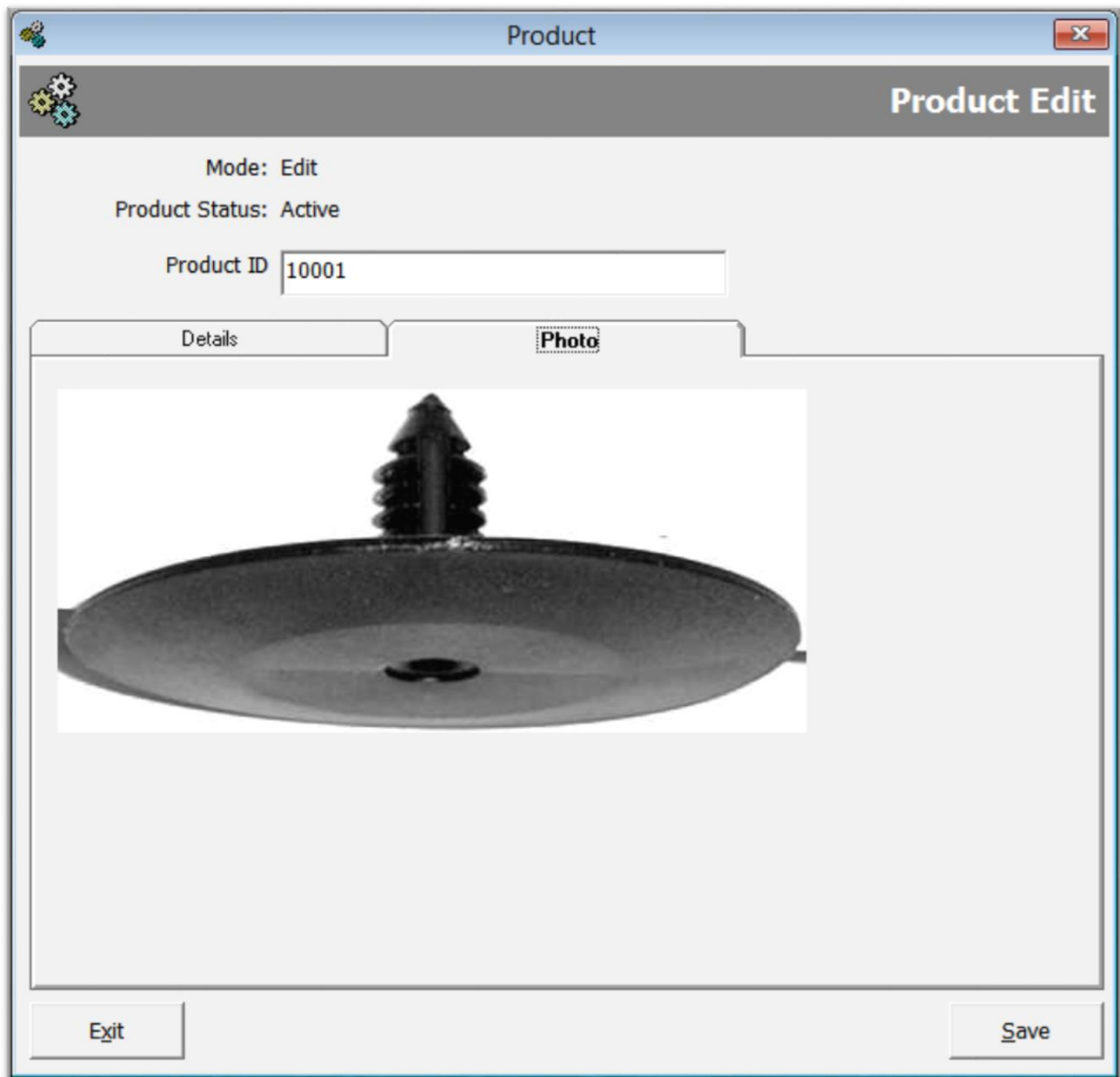
[Import]

Add / Edit / Duplicate Parts

Click the **Add** to add a new product or click **Edit** to edit an existing product.

The Summary window will have the Product Name, Barcode, List Price, and will allow you to select if the part is Billable. For an item to print on an invoice, it must be marked **Billable**.

The photo window will display a photo of the product if available.

Product images are located in the Materials Manager™ folder, in a folder called Pictures. To add images of your own products the image name must be the same as the Product ID with a p at the beginning. Images must be jpg.

Example: Product 10001 = p10001.jpg

Importing Products

Materials Manager Lite™ has an Import feature allowing the addition of a large number of items through one process rather than one at a time.

File Layout

Using your preferred spreadsheet application (Microsoft Excel pictured) layout your columns as seen below.

Product ID	Product Name	Barcode	Manufacturer	Reorder Uni	Reorder Qt	Cost	List Price	Class	Billable
Product #	Description - Includes Manufacturer and basic information	84410401430	CLIPLIZARD	Each/Pack	#	$	$	FASTENER	0/1

Column Order:
1. Product ID
2. Product Name
3. Barcode
4. Manufacturer
5. Reorder Unit (EA, PK, BX…..)
6. Reorder Quantity (How many items in Reorder Unit?)
7. Cost
8. List
9. Class
10. Billable Status (1=Yes, 0=No)

If you are entering these column titles into the spreadsheet, be sure to remove them before saving the file for import.

Once you have completed your import file in the spreadsheet and removed the column headers, save the file as a Tab Delimited Text file.

Product Import Procedure

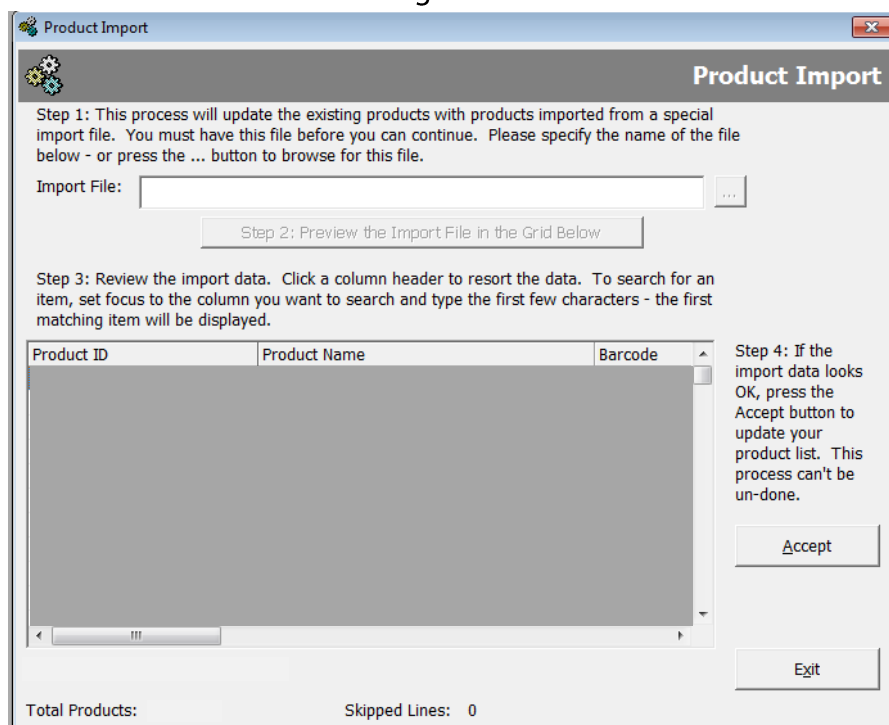1. Open Materials Manager™ and click on Product Maintenance
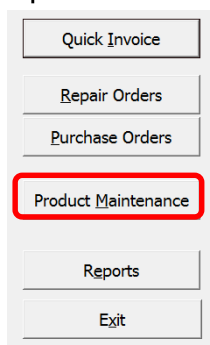
2. Click on the **Import** button
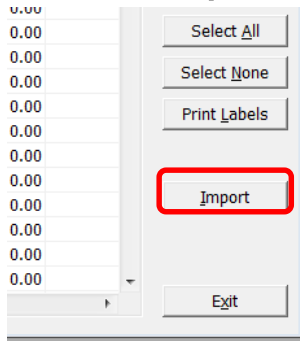
3. Click on the … button to select the file to import. The file you need is a .txt file (yourfile.txt)
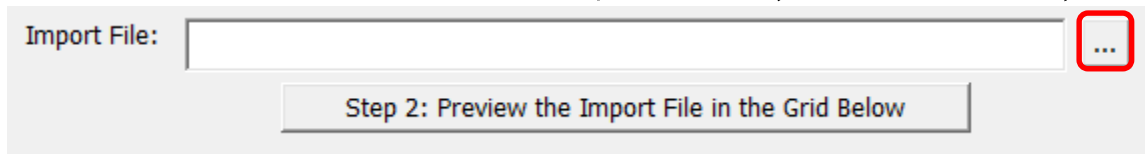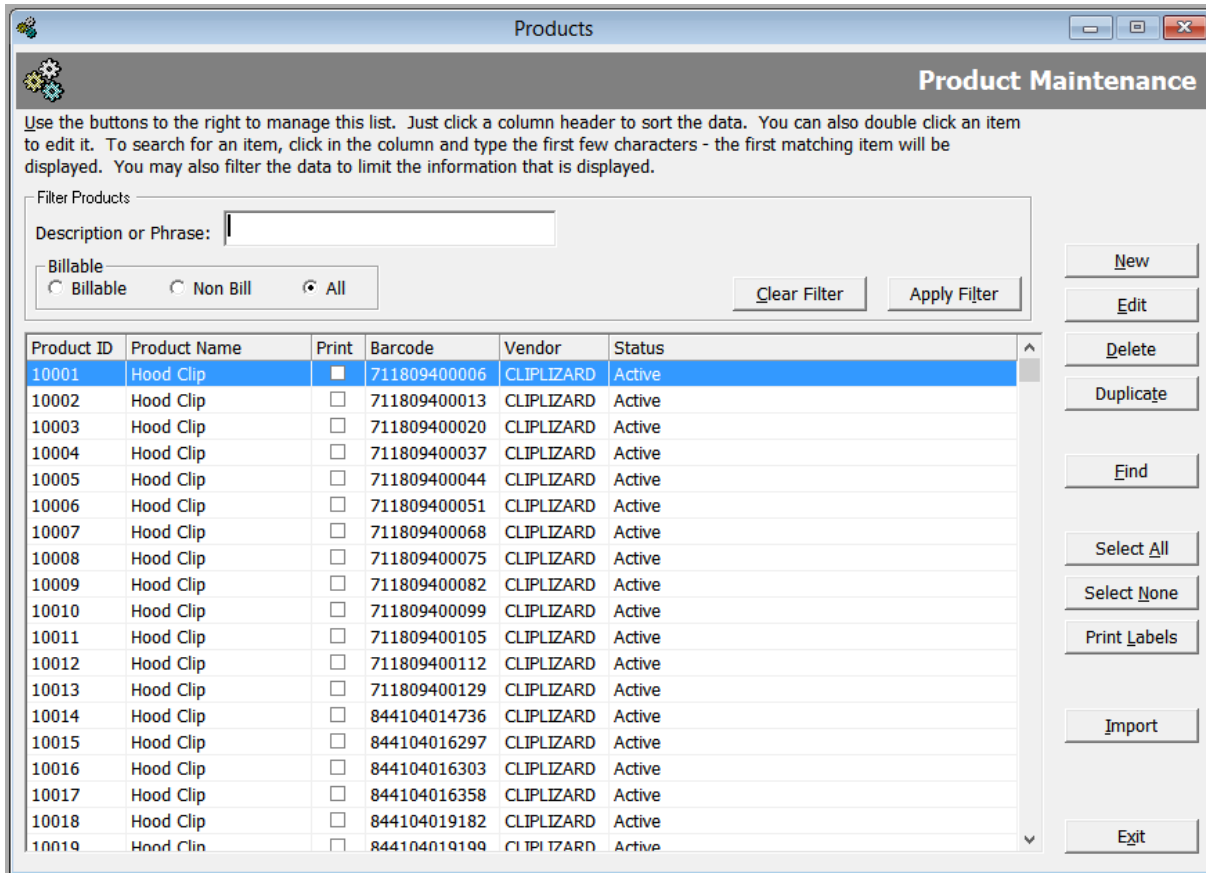

4. Once you have selected your file, click the **Step 2** button to preview the data. You should see something similar to this.

5. Once this process is complete, you will be returned to the Main Menu.

Printing Labels

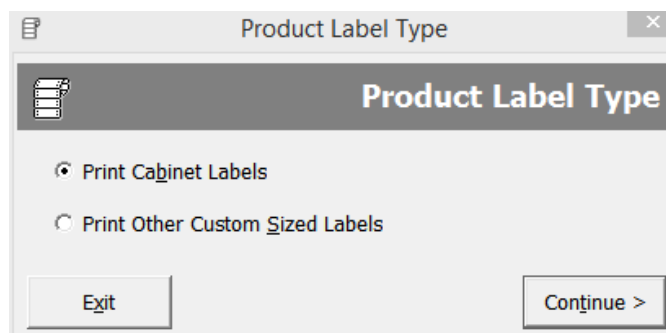Start by selecting the parts you want to include to print on the labels. If you would like to print all products, press the **Select All** button.

Click on the **Print Labels** button

Select to print Cabinet Labels or others from a custom label size. Click on the **Continue** button.

Select how many copies of the labels to print and how many labels to skip should you be reusing a sheet of labels with missing labels.. Select which fields to print. If you have not loaded pictures for your products, deselect the Pictures option. Click on the **Preview** button to continue.

If the Colored Usage option is selected you will be prompted to select a date range. Materials Manager Lite™ will analyze the selected product's usage over that time period and assign a colored bar to indicate that item's usage level. It does take time for the Colored Usage option to gather enough information about products that you use to be effective, so if the items you are printing are new, unselect this option.
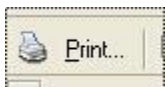
A print preview of the labels is provided. The **X** represents no usage data for that product.

Click on the **Print** button to finalize printing your cabinet labels.


After printing the labels, click on the **Close** button. You will be prompted to clear the print checkboxes from the product maintenance screen. Select **Yes** if your labels printed correctly and you do not need to print them again.
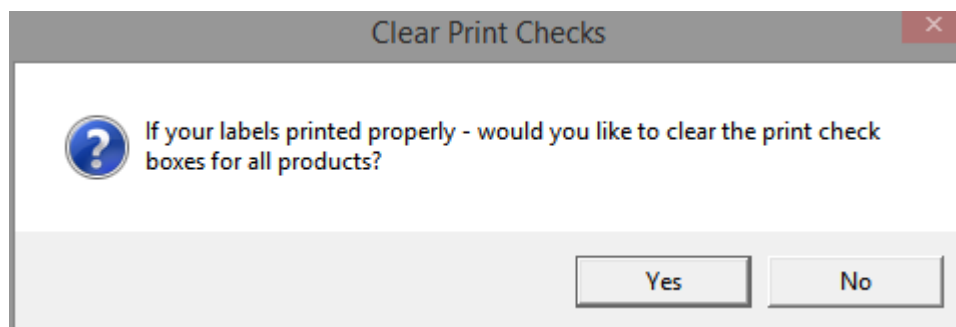
Managing Usage Locations

To manage Usage Locations, click on **Lists, Usage Locations**. From the Usage Location window, you will see a pre-populated list of usage locations being synced from the server. You cannot edit or delete these locations. To create a new usage location, click on the **New** button.
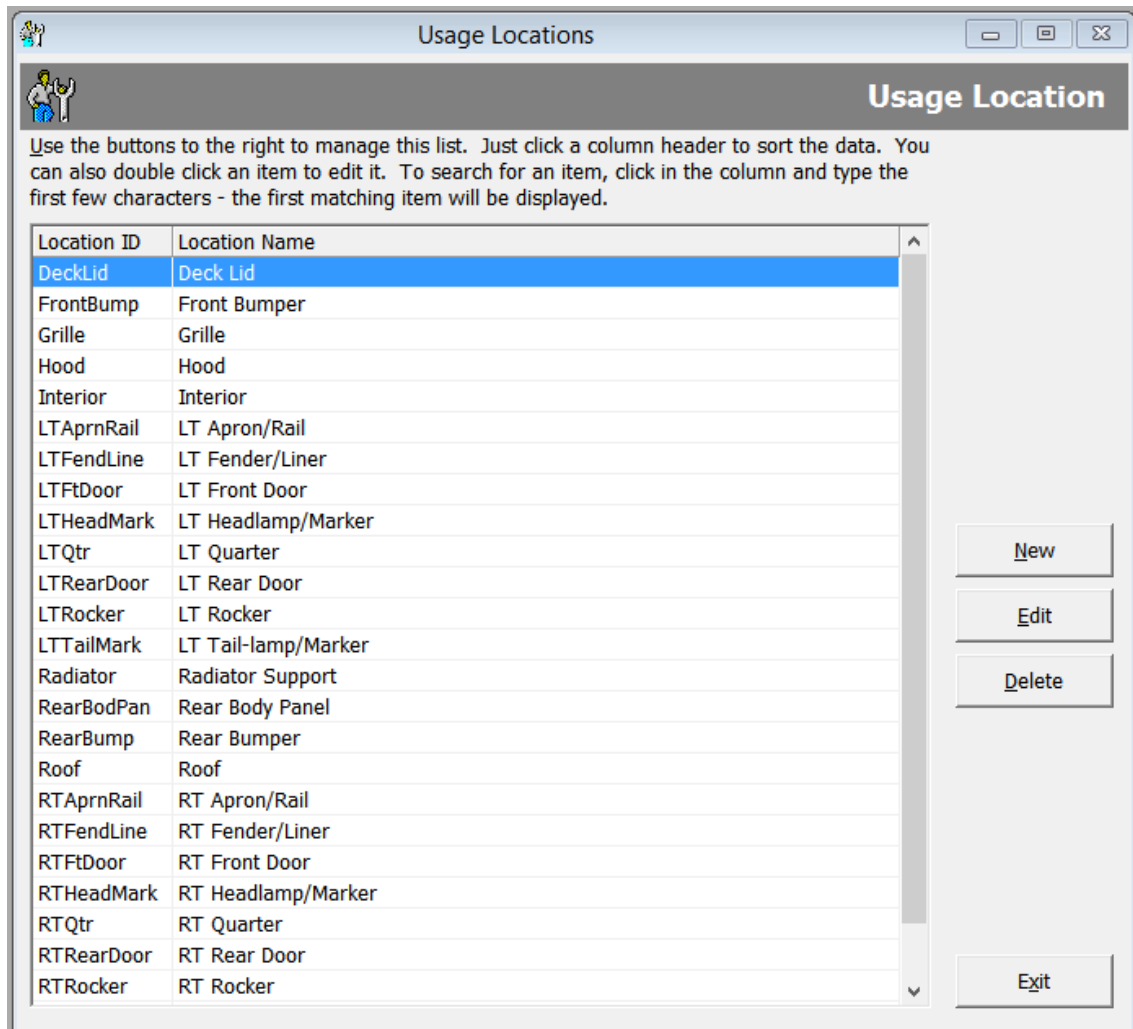
Type in the Location ID and Description and click the **Save** button to save the new usage location.
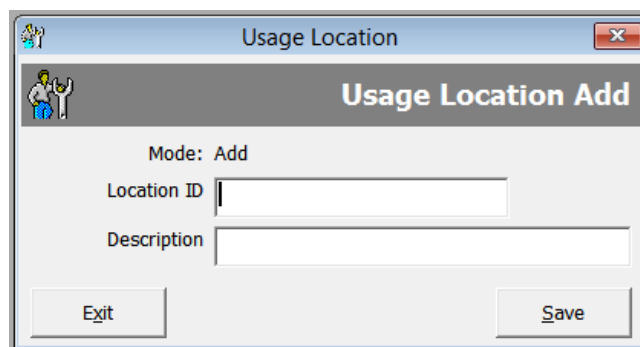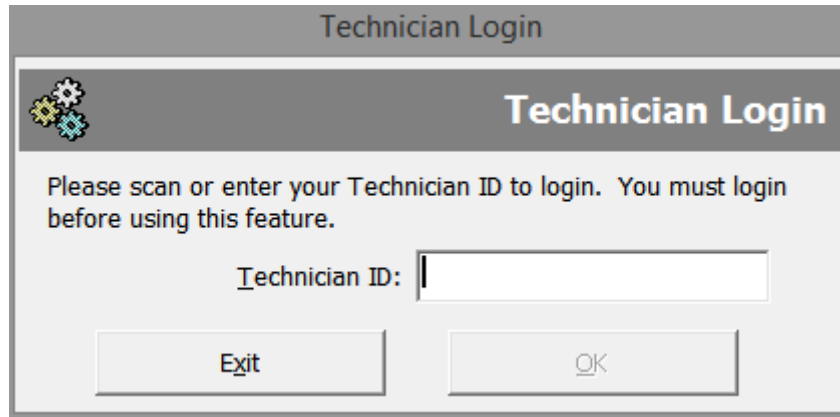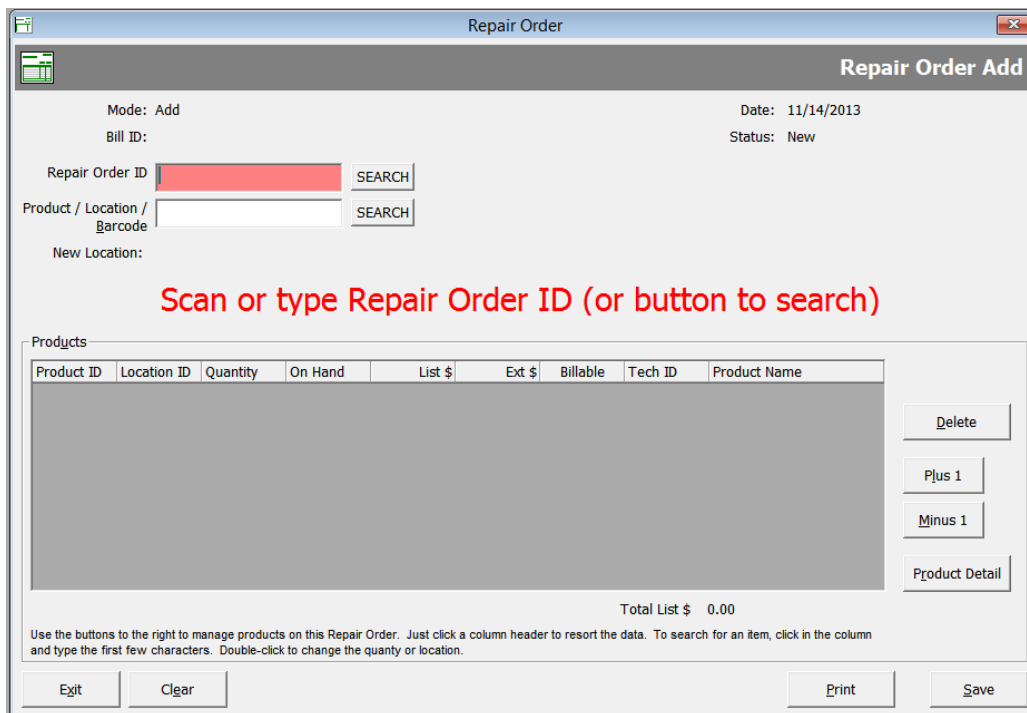
The Main Menu
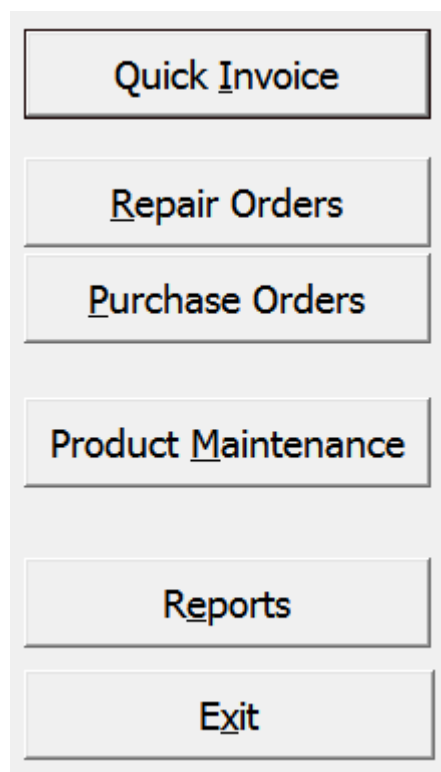
Repair Orders

To create a new Repair Order, click on the **Quick Invoice** button from the main menu.
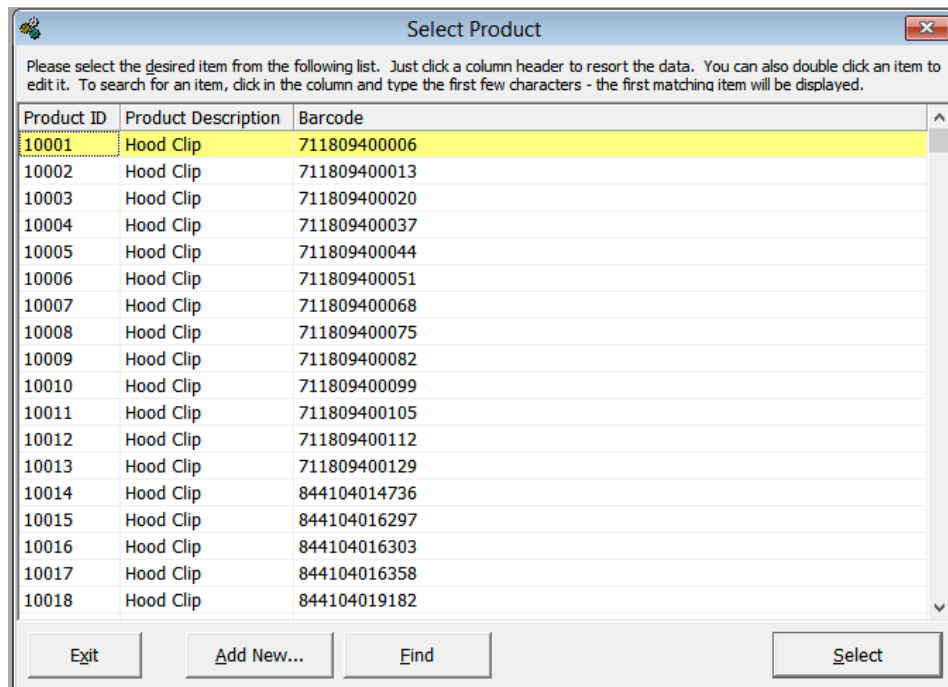

Type in your technician ID

Scan, Type, or **SEARCH** for the Repair Order ID.

The Product / Location / Barcode field is a multipurpose field used for adding products, setting a usage location for that product, or for scanning the barcodes of either. Type or enter your product ID first, then select the usage location.

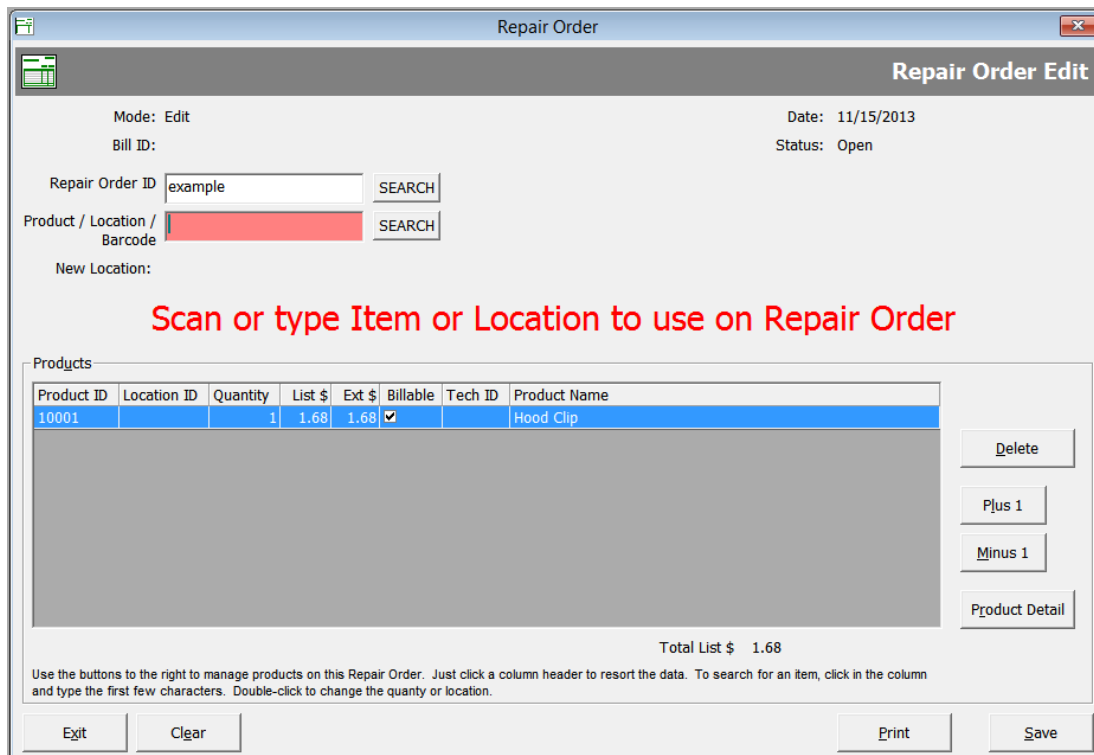Next, Scan, type, or **SEARCH** for the product ID(s) that you want to add to the repair order.

Once you are finished adding the part(s) necessary for the repair order;

Click on the **Plus 1, Minus 1,** or double click on the product to adjust the quantity needed for the repair order. If you have printed the Barcode Quantity Scan Sheet from the **Reports** module, scan the number on that sheet to set the quantity.

From here, you can also click on the **Lookup** button to search the list of Usage Locations and select the location the part was, or will be used.
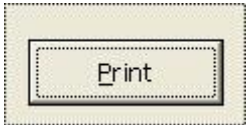

After finalizing the part(s), quantities, and usage locations, click the **Save** button to save the repair order. If no more edits are required on the repair order and it is ready to be finalized, click on the **Print** button to print the repair order. The Repair Order cannot be edited after printing.

The printed Job Ticket / Invoice

Repair Orders

To manage repair orders, click on the **Repair Orders** button from the main menu.

The Repair Orders main menu appears. From here, you can view open orders, printed orders, or all. You can create new repair orders, edit existing open Repair Orders, or reprint a Repair Order.   A Repair Order can only be deleted if all products are removed first. Printed Repair Orders cannot be deleted.

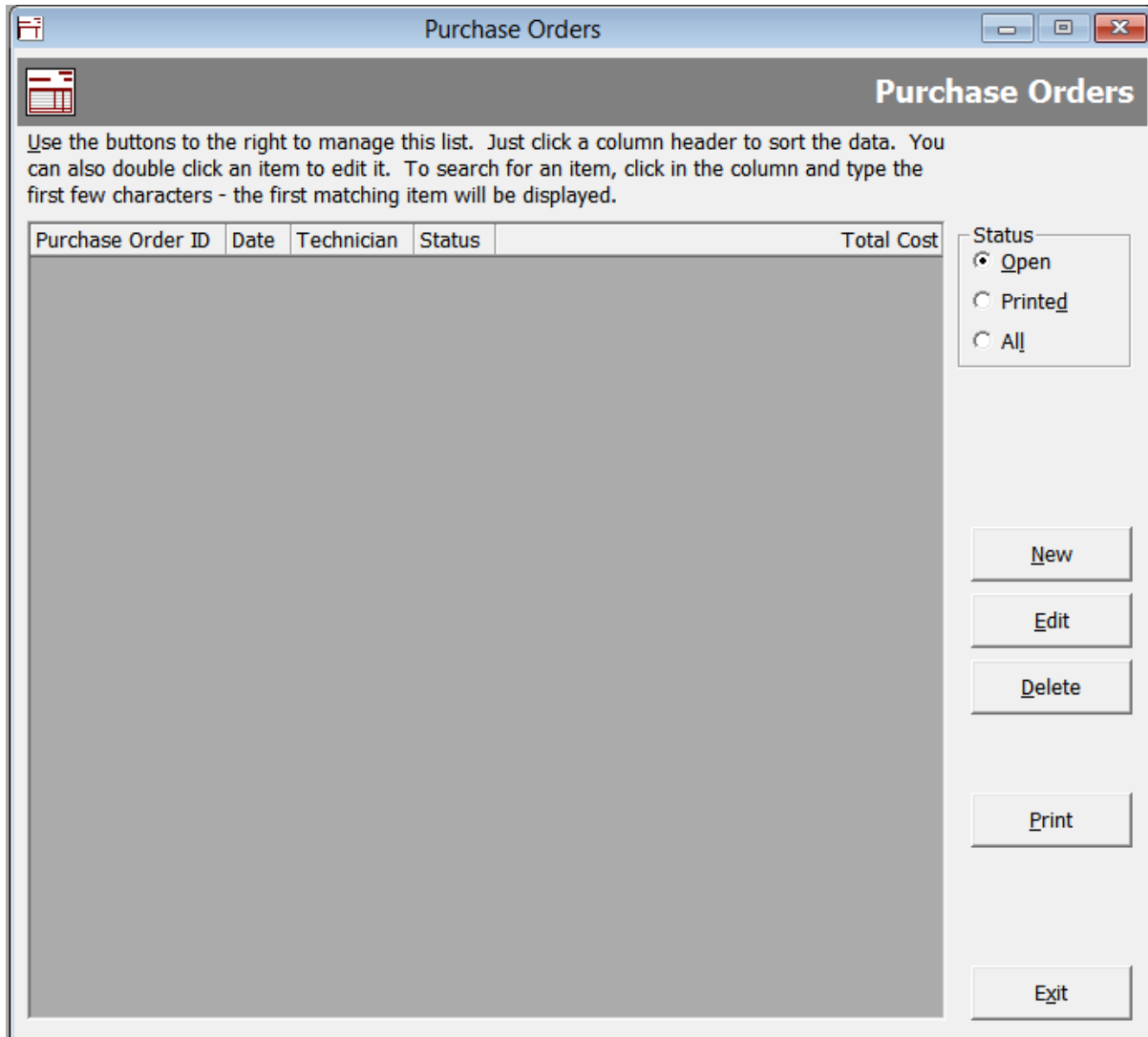****Printed repair orders cannot be edited or deleted****

To create a new repair order or edit an existing repair order, view the section "Quick Invoice (Repair Order)"

Purchase Orders

To manage Purchase Orders, click on the **Purchase Orders** button from the main menu.
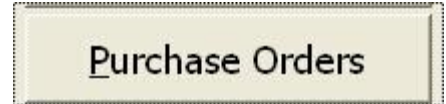
The Purchase Orders window appears. From here, you can view Open, or Printed Purchase Orders.

The **New** button generates a new purchase order.

The **Edit** button will edit an existing purchase order that is still in the open phase.
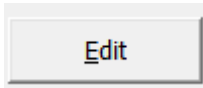
The **Delete** button allows you to delete a purchase order that is still in the open phase.
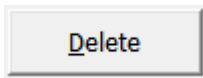
The **Print** button takes a purchase order currently in the open phase and finalizes and prints the purchase order.

New Order

Click on the **New** button to create a new order

Enter in a Purchase Order ID and press Enter.

Scan, Type, or **SEARCH** for part(s) you would like to order. Double click on the parts, or press the **Select** button to add the item(s) to the order.

Select the **Product Detail** button if you would like additional information about the part you have selected.

Adjust the quantities to order by double clicking the *Qty to Order* field.

If you would like to save the order but not finalize, click the **Save** button. If you are ready to finalize the order, click the **Print** button. The **Clear** button will clear the window but it does not clear the Purchase Order.

To edit an open Purchase Order you can double click on the Purchase Order or click on it and click **Edit.**

Only open Purchase Orders can be edited

Reports

To view Reports, click on the **Reports** button from the main menu.

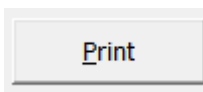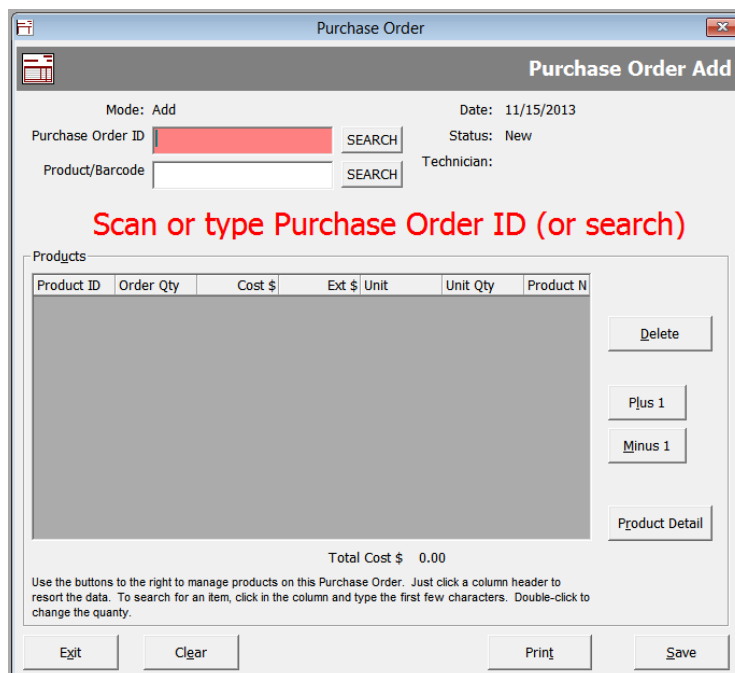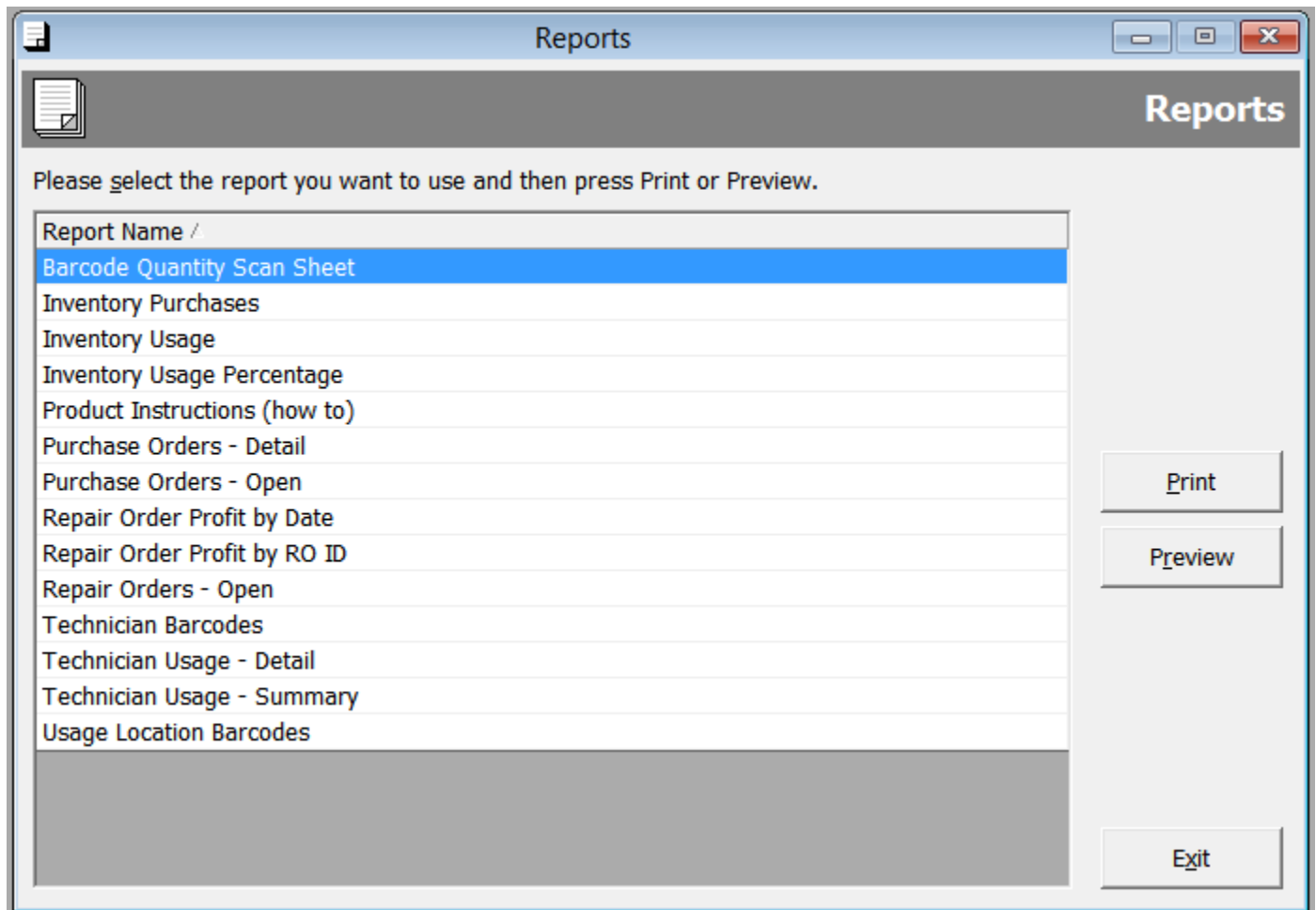The Reports window appears. From here, you can print or preview one of the many reports included in Materials Manager Lite™.

Networking

Many shops have more than one PC and benefit from the ability to access Materials Manager Lite™ data from the shop in the office. This allows your technicians to focus on the vehicle and your office personnel on the paperwork. Your technicians scan out the products that they are using on their workstation and you print the invoice from yours. Because Materials Manager Lite™ is licensed on a site level, you can install it on all of the PC's within your location using the same registration information so you can ensure consistency in your printed invoices and purchase orders. Since all PC's are sharing the same data, maintenance of products and other items can be managed from any Materials Manager Lite™ networked PC.

Requirements:
Network: 100 BaseT (Wireless N possible for client PC's only. Do not attempt to use a wireless host.)
Windows File and Printer Sharing enabled and passed through firewalls

Host Preparation

On the host machine:
- Install Materials Manager Lite™
- Register Materials Manager Lite™
- Share the C:\Program Files\Materials Manager™ directory (or appropriate install directory)
    - Do ensure that all users have read/write access to this share for proper operation

Client Preparation

On the client machine:
- Install Materials Manager Lite™
- Register Materials Manager Lite™
- Close Materials Manager Lite™
- Map a network drive to the shared directory on the host PC.
- Open the Materials Manager.ini found in the local Materials Manager™ installation directory. Common default paths below.
    - C:\Program Files\Materials Manager\Materials Manager.ini
    - C:\Program Files (x86)\Materials Manager\Materials Manager.ini
    - C:\Users\%USERNAME%\AppData\Local\Program Files\Materials Manager\Materials Manager.ini
    - C:\Users\%USERNAME%\AppData\Local\Program Files (x86)\Materials Manager\Materials Manager.ini
- Modify the line "**Database File=C:\Program Files\Materials Manager\MatMgr.mdb**" replacing C:\Program Files with your mapped drive letter.
- Save your changes and run Materials Manager Lite™

Common issues with networking Materials Manager Lite™ generally involve firewall or security settings. We recommend you have your IT person or firm setup the networking if possible to ensure best results.

Our support department can assist with troubleshooting issues related to Materials Manager Lite™ networking but due to liability concerns will not make configuration changes to your network.

Support Information

For support of Materials Manager™ please contact:

Email: support@cliplizard.com

Website: www.cliplizard.com

ClipLizard Systems, LLC®.
226 State Highway 43
Spencer, IN 47460

Phone: 812-714-8050