



Materials Manager Pro™ User Manual



Materials Manager Pro™ User Manual

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Getting Started

Installing Materials Manager Pro™

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.

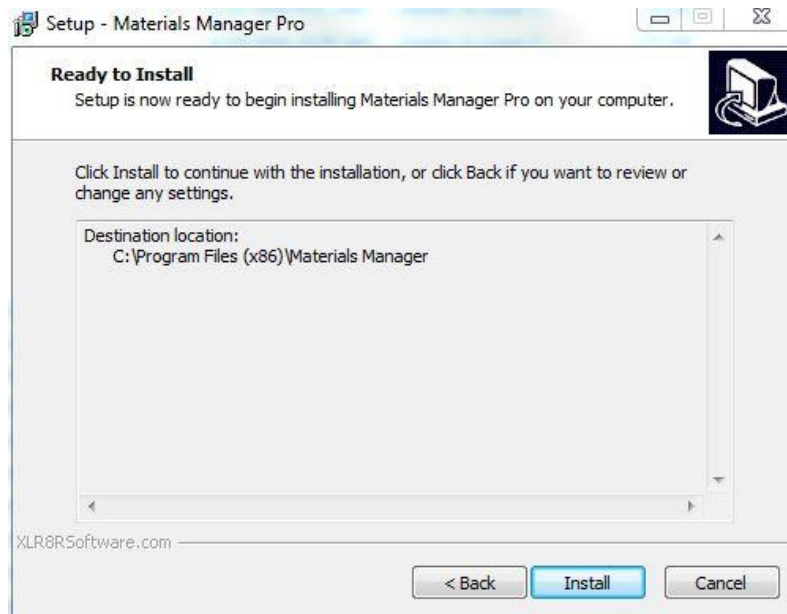


After clicking next, you are presented with the option to choose an installation directory. We recommend the default provided location.

****64 bit PC's will install to Program Files (x86) by default****



Here you are prompted to review or make changes to the install location. The defaults provided are recommended.



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



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

Upon opening Materials Manager Pro™ 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**.

End User License Agreement

End User License

Please review the End User License Agreement and accept it before using this software.

MATERIALS MANAGER™ LICENSE AGREEMENT

This Software License Agreement ("Agreement") is made and effective upon your acceptance of this Agreement, and constitutes a legal agreement by and between Tech-Connect ("Developer") and you, the purchaser of this Software ("Licensee"). You may accept the terms and conditions of this Agreement by clicking upon the ACCEPT link. Licensee may install and use the Materials Manager Software only if the Licensee accepts this Agreement.

Licensee desires to utilize a copy of this Software.

NOW, THEREFORE, in consideration of the mutual promises set forth herein, Developer and Licensee agree as follows:

1. License.
Developer hereby grants to Licensee a non-exclusive, limited license to use the Software in the United States of America for a period of one year as set forth in this Agreement. The one year license period begins upon the date you purchase and register this Software. You must pay a further fee and obtain a new registration code to use this Software after a year elapses.
2. Restrictions.
Licensee shall not modify, copy, reverse engineer, decompile, duplicate, reproduce, license or sublicense the Software, or transfer or convey the Software or any right in the Software to anyone else without the prior written consent of Developer; provided that Licensee may make one copy of the Software for backup or archival purposes.
3. Fee.
In consideration for the grant of the license and the use of the Software, Licensee has paid a fee to obtain and use this Software.
4. Warranty of Title.
Developer hereby represents and warrants to Licensee that Developer is the owner of the Software or otherwise has the right to grant to

☐ I Agree to the End User License Agreement.

Exit Continue

Registering Materials Manager Pro™

By default, Materials Manager Pro™ installs as a 30-day fully functional demo. To use Materials Manager Pro™ beyond this 30-day period you will need to purchase an annually renewable registration. Provide the following information to your paint/parts distributor 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 will need to be entered into Materials Manager Pro™ to unlock the software.

To enter your new registration, go to **Tools > Registration**.

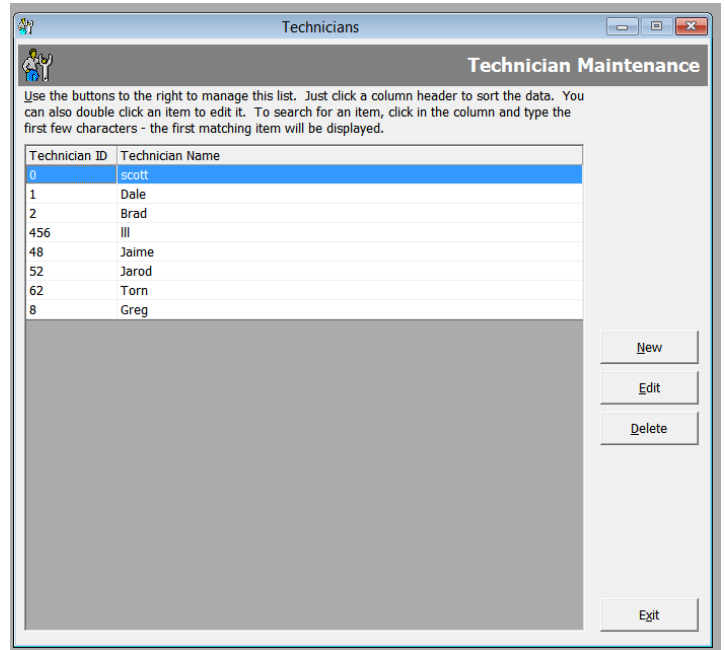
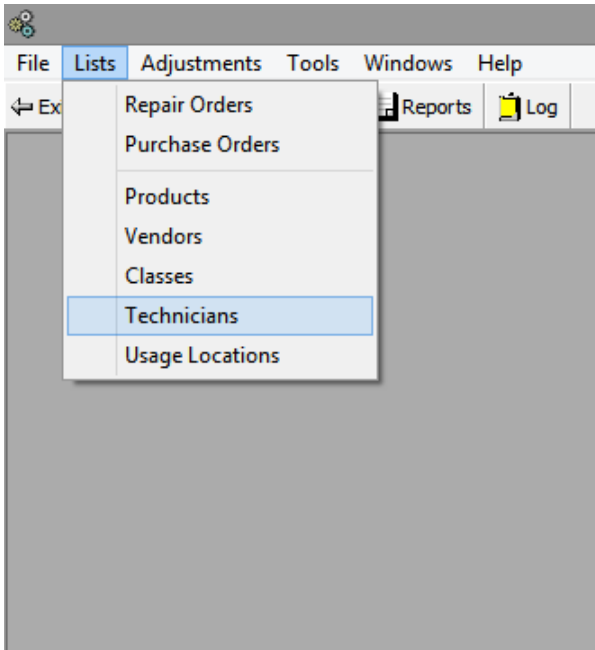
The screenshot shows the Materials Manager application interface. On the left, the 'Tools' menu is open, displaying various options. The 'Registration...' option at the bottom of the menu is highlighted with a blue selection bar. On the right, the 'Registration' dialog box is displayed. It features a title bar with the word 'Registration' and a gear icon. Below the title bar, a message states: 'Please enter your company information and registration key EXACTLY as provided. If the information was provided in an email, you can copy the individual fields to this window.' The dialog contains several text input fields: 'Company Name:', 'Street Address:', 'City:', 'State/Country:', 'Zip/Postal:', 'Phone:', 'Fax:', 'Email Address:', and 'Registration Key:'. At the bottom, it shows 'Current Status: Licensed - Thank You' and two buttons: 'Exit' and 'Save Registration'.

Enter your registration **exactly** as it is sent to you, in the fields in the registration window then click **Save Registration**. You should see under **Current Status** the message "Licensed – Thank You". The Registration Key will be hidden after registration is saved.

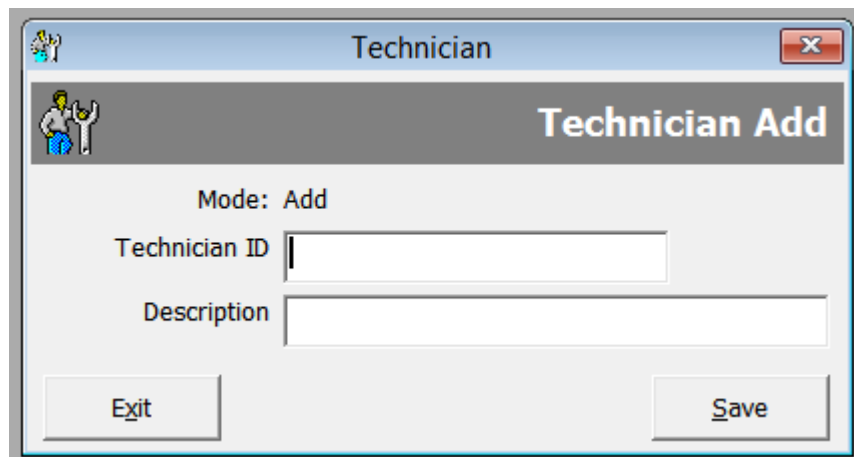
Navigating Materials Manager Pro

All major functions of Materials Manager Pro require a log-in by the technician performing the function.

To add a technician, go to **List > Technicians**.



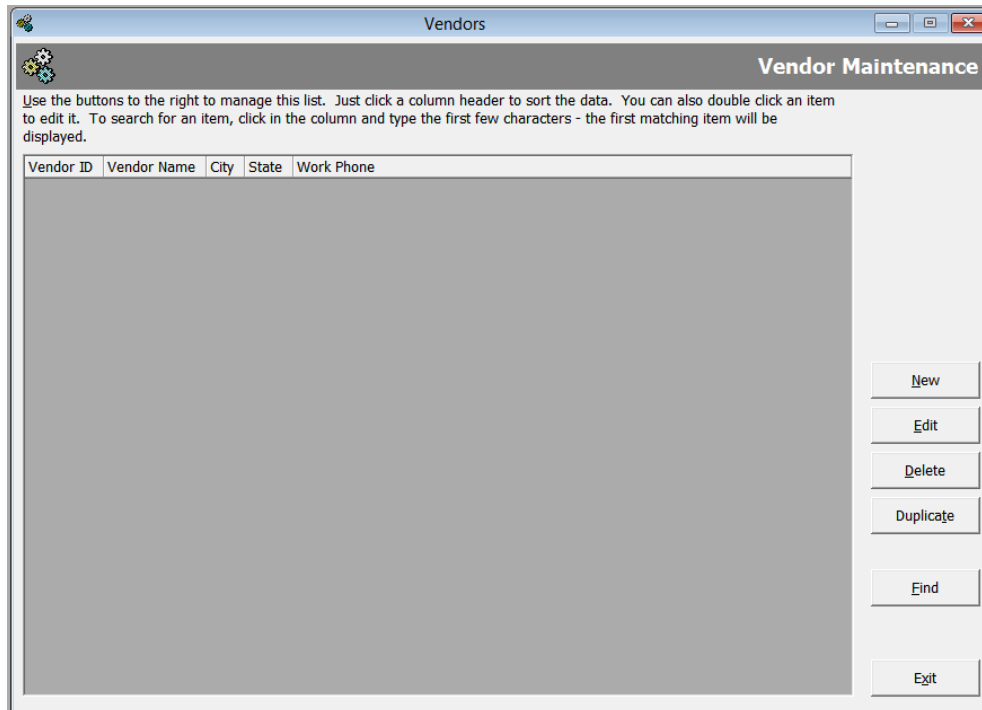
Click on **New** or **Edit** to change an existing Technician.



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

Managing Vendors

To manage vendors, click on **Lists, Vendors** from the toolbar. The Vendor maintenance window appears. Click on the **Edit** button to edit an existing vendor. Click on the **New** button to create a new vendor.



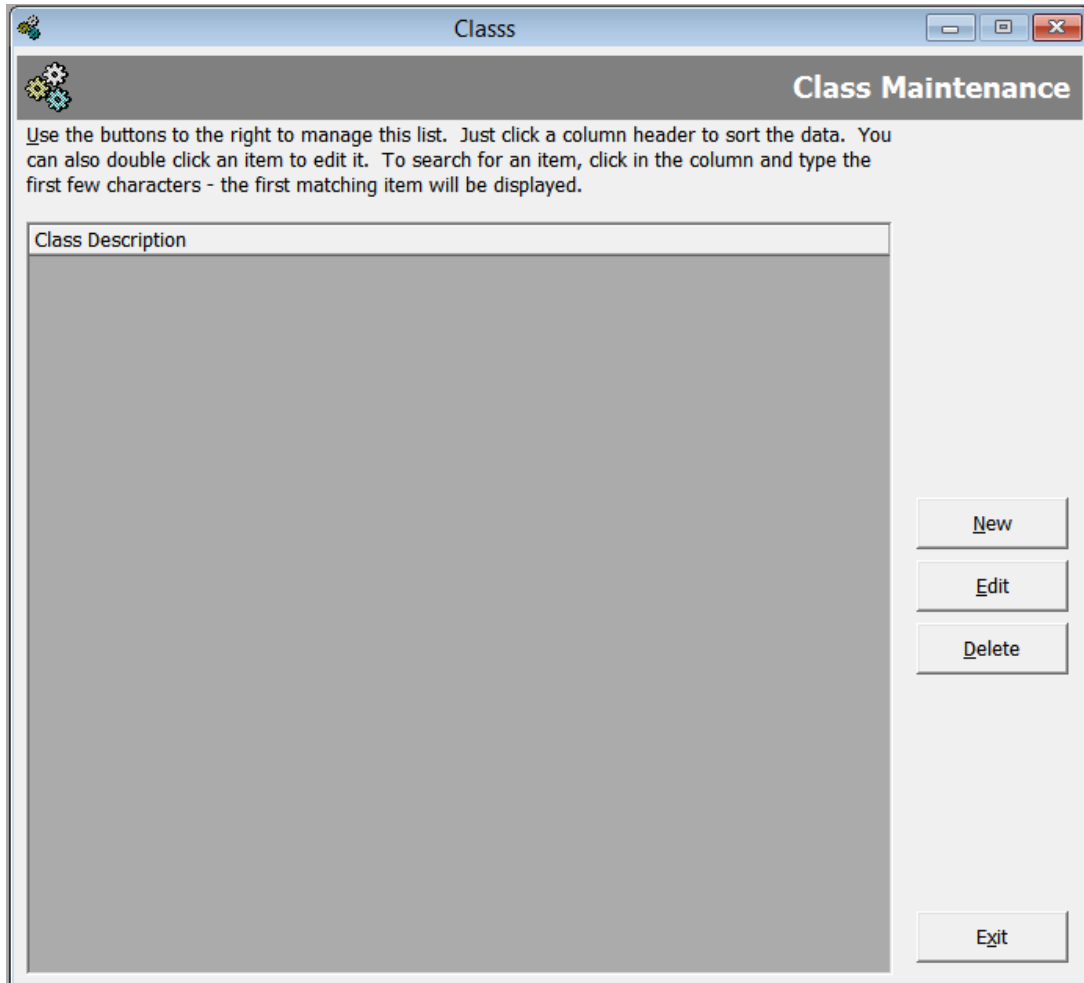
When creating a new vendor to be used for Purchase Orders, enter in as much detail as possible. When finished filling out the information, click the **Save** button to save the new vendor.

The screenshot shows a window titled "Vendor" with a sub-header "Vendor Add". Below the header is a label "Mode: Add". The form contains several input fields: Vendor ID, Vendor Name, Address 1, Address 2, City, State, Zip, Phone, Fax, Email Address, and Contact. At the bottom of the form are two buttons: Exit and Save.

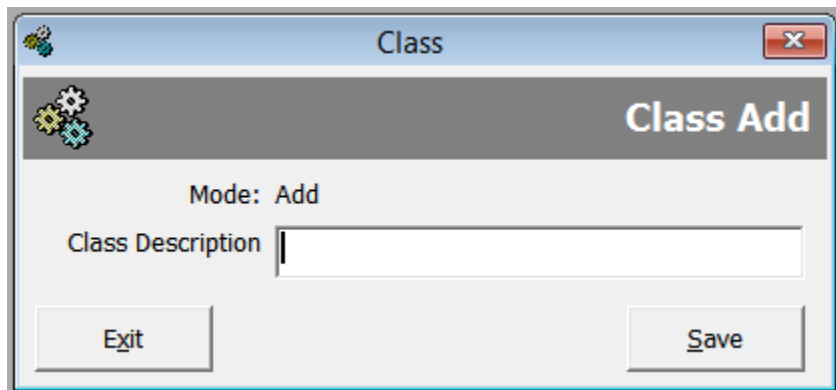
****If only using one vendor, that Vendor ID *must* be PRIMARY.**

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, duplicate parts, and search/filter parts. You can also print labels or import existing inventory.

Products

Product Maintenance

Use the buttons to the right to manage this list. Just click a column header to sort the data. You can also double click an item to edit it. To search for an item, click in the column and type the first few characters - the first matching item will be displayed. You may also filter the data to limit the information that is displayed.

Filter Products

Description or Phrase Search Item

Vendor ID Class

Vendor Name

Status
☒ Active
☐ Inactive
☐ All

Included
☐ Included
☐ Non Inc
☒ All

Billable
☐ Billable
☐ Non Bill
☒ All

Apply Filter
Clear Filter

2401 record(s) found!

Product ID	Product Name	Print	Barcode	On Hand Qty	Minimum Qty	Vendor ID	Manufacturer
101-100	Nylon Push Clip	<input checked="" type="checkbox"/>	844104025725	0	0	PRIMARY	CLIPLIZARD
101-101	Nylon Push Clip	<input type="checkbox"/>	844104025732	0	0	PRIMARY	CLIPLIZARD
101-102	Nylon Push Clip	<input type="checkbox"/>	844104025749	0	0	PRIMARY	CLIPLIZARD
101-103	Nylon Push Clip	<input type="checkbox"/>	844104026029	0	0	PRIMARY	CLIPLIZARD
101-104	Nylon Push Clip	<input type="checkbox"/>	844104026111	0	0	PRIMARY	CLIPLIZARD
101-105	Nylon Push Clip	<input type="checkbox"/>	844104026210	0	0	PRIMARY	CLIPLIZARD
101-106	Nylon Push Clip	<input type="checkbox"/>	844104026227	0	0	PRIMARY	CLIPLIZARD
101-107	Nylon Push Clip	<input type="checkbox"/>	844104026241	0	0	PRIMARY	CLIPLIZARD
101-108	Nylon Push Clip	<input type="checkbox"/>	844104026340	0	0	PRIMARY	CLIPLIZARD
101-109	Nylon Push Clip	<input type="checkbox"/>	844104026494	0	0	PRIMARY	CLIPLIZARD
101-110	Nylon Push Clip	<input type="checkbox"/>	844104026517	0	0	PRIMARY	CLIPLIZARD
101-111	Nylon Push Clip	<input type="checkbox"/>	844104026524	0	0	PRIMARY	CLIPLIZARD
101-112	Nylon Push Clip	<input type="checkbox"/>	844104026616	0	0	PRIMARY	CLIPLIZARD
101-113	Nylon Push Clip	<input type="checkbox"/>	844104026623	0	0	PRIMARY	CLIPLIZARD
101-114	Nylon Push Clip	<input type="checkbox"/>	844104026630	0	0	PRIMARY	CLIPLIZARD

New
Edit
Delete
Duplicate
Find
Select All
Select None
Print Labels
Import
Exit

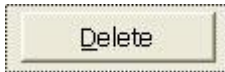
The **New** button creates a new part.



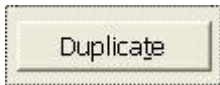
The **Edit** button edits an existing part.



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



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



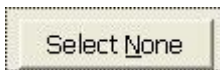
The **Find** button allows you to enter a search phrase for parts.



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



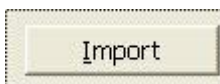
The **Select None** button deselects all parts



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



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



Add / Edit / Duplicate Parts

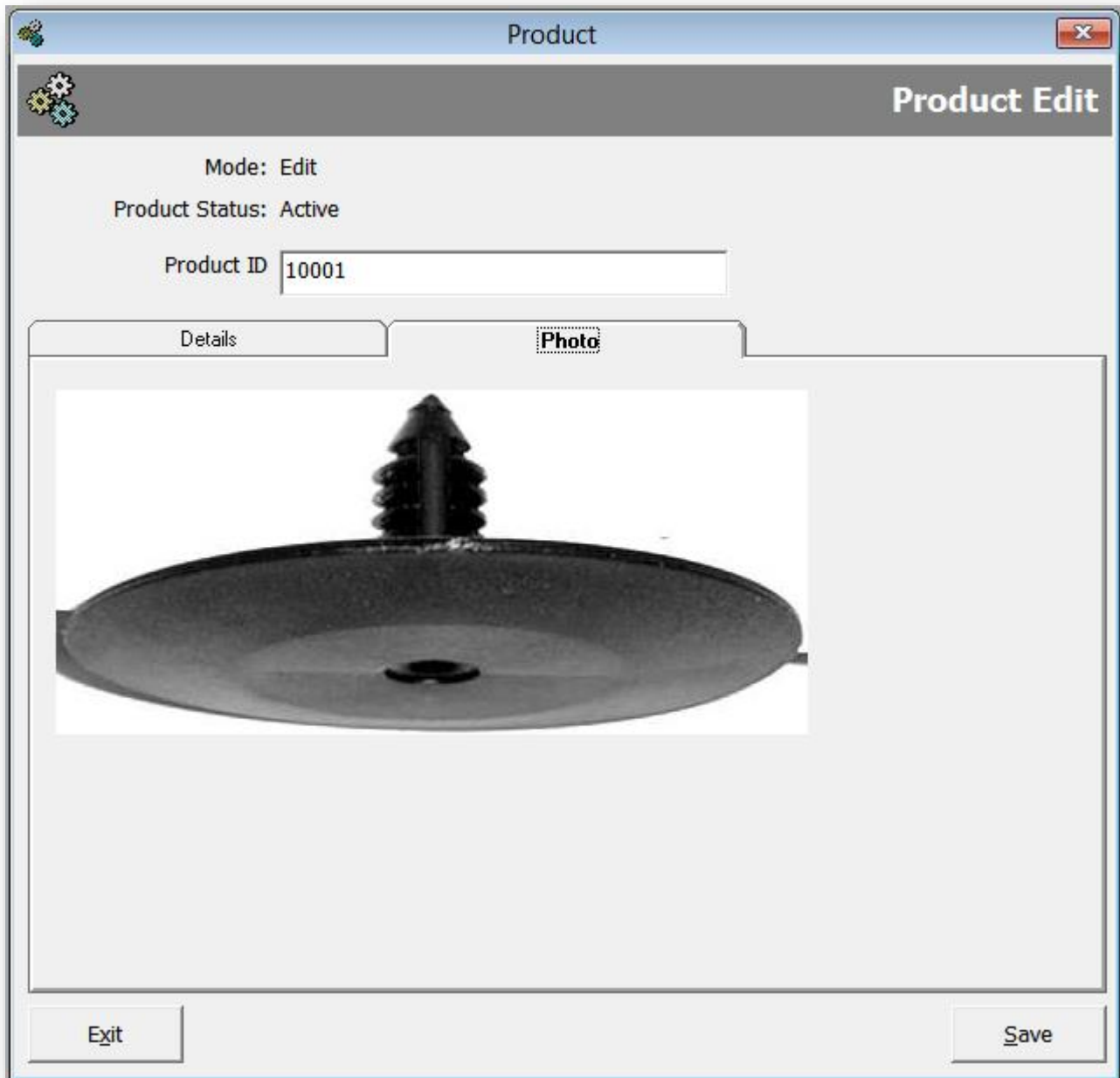
Click the **Add** button to enter a new item or click the **Edit** button to edit an existing product.

The Summary window will have the Product ID, Product Name, Barcode 1, Barcode 2, Vendor ID, Manufacturer, Order Unit and Size, Minimum Quantity, Current On-Hand Quantity, Cost/List Price, and will allow you to select if the part is Billable, Included, and Active. For an item to print on an invoice, it *must* be marked **Billable**.

The screenshot shows the 'Product Edit' window in the Materials Manager software. The window title is 'Product' and it has a 'Product Edit' header. The mode is set to 'Edit' and the product status is 'Active'. The product ID is '10001'. The 'Details' tab is selected, showing fields for Product Name ('Hood Clip'), Barcode 1 ('711809400006'), Suggested Barcode, Barcode 2 ('711809400006'), Vendor ID ('PRIMARY'), and Manufacturer ('CLIPLIZARD'). There are checkboxes for 'Billable when checked, non-billable when unchecked' (checked), 'Included' (unchecked), and 'Active when Checked, non-useable when unchecked' (checked). The 'Reorder' section includes Order Unit ('PK'), Order Unit Size ('25'), and Minimum Quantity ('5'). The 'On Hand Quantity' is '0'. The 'Pricing' section shows Cost \$ ('0.2160') and List \$ ('1.68'). The Class is 'CLIPS'. At the bottom are 'Exit' and 'Save' buttons.

Product Edit	
Mode: Edit	
Product Status: Active	
Product ID: 10001	
Details Photo	
Product Name: Hood Clip	
Barcode 1: 711809400006	
Suggested Barcode	
Barcode 2: 711809400006	
Vendor ID: PRIMARY	
Manufacturer: CLIPLIZARD	
<input checked="" type="checkbox"/> Billable when checked, non-billable when unchecked	
<input type="checkbox"/> Included	
<input checked="" type="checkbox"/> Active when Checked, non-useable when unchecked	
Reorder	
Order Unit: PK	
Order Unit Size: 25	
Minimum Quantity: 5	
On Hand Quantity: 0	
Pricing	
Cost \$: 0.2160	
List \$: 1.68	
Class: CLIPS	
Exit Save	

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 Pro™ 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.

ProductID	Description/Name	Barcode1	Manufacturer	ReorderUnit	ReorderUnitSize	Cost	List	Class	Billable	Vendor	QOH	MOHQ		Barcode2
10001	Hood Clip	711809400006	CLIPLIZARD	PK	25	0.216	1.68	CLIPS	1	PRIMARY	0	0	0	711809400006

Column Order:

1. Product ID
2. Product Description/Name
3. Barcode1
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)
11. Vendor
12. Quantity on Hand
13. Minimum on Hand Quantity
14. Inventory Field (Always use 0)
15. Barcode2

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

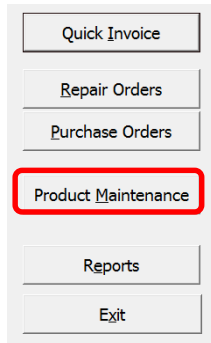
Once you have completed your import file in the spreadsheet and removed the column headers, save the file as a Tab Delimited Text file.

*15 columns are required for a successful import as of Version 5.16.0517

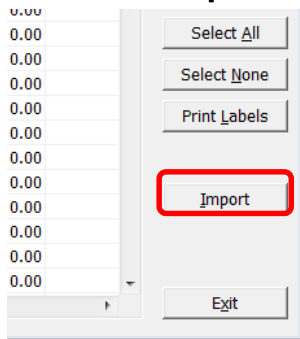
*Versions prior to 5.16.0517 require a 14 column import. Remove the Barcode2 column to allow this.

Product Import Procedure

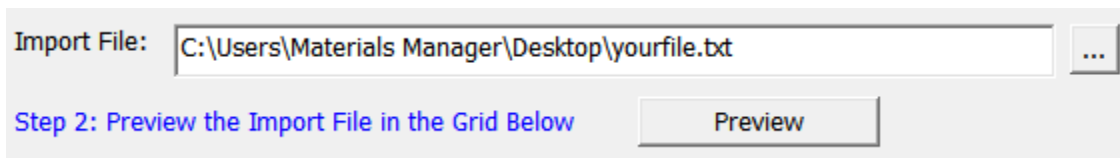
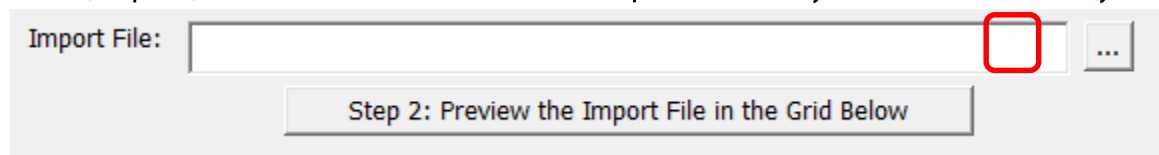
1. Open Materials Manager™ and click on Product Maintenance



2. Click on the **Import** button



3. Click on the (ellipses) ... 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: Preview the Import File in the Grid Below** button to preview the data. You should see something similar to this.

Product Import

Step 1: This process will update the existing products with products imported from a special import file. You must have this file before you can continue. Please specify the name of the file below - or press the ... button to browse for this file.

Import File: ...

Step 2: Preview the Import File in the Grid Below

Step 3: Review the import data. Click a column header to resort the data. To search for an item, set focus to the column you want to search and type the first few characters - the first matching item will be displayed.

Product ID	Product Name	Barcode	Manufacturer	Reorder Un
10001	Hood Clip	711809400006	CLIPLIZARD	PK
10002	Hood Clip	711809400013	CLIPLIZARD	PK
10003	Hood Clip	711809400020	CLIPLIZARD	PK
10004	Hood Clip	711809400037	CLIPLIZARD	PK
10005	Hood Clip	711809400044	CLIPLIZARD	PK
10006	Hood Clip	711809400051	CLIPLIZARD	PK
10007	Hood Clip	711809400068	CLIPLIZARD	PK
10008	Hood Clip	711809400075	CLIPLIZARD	PK
10009	Hood Clip	711809400082	CLIPLIZARD	PK
10010	Hood Clip	711809400099	CLIPLIZARD	PK
100107	Door/Hood Hardware	711809400000	CLIPLIZARD	PK

Total Products: 2,401 Skipped Lines: 0

Step 4: Choose values to import.
Be careful with overwriting quantity values!

Import Items

- ☒ Product Name
- ☒ Barcode
- ☒ Manufacturer
- ☒ Reorder Unit
- ☒ Reorder Quantity
- ☒ Cost
- ☒ List Price
- ☒ Class
- ☒ Billable
- ☒ Vendor ID
- ☒ **On Hand Quantity**
- ☒ **Minimum Quantity**
- ☒ Included
- ☒ Barcode2

Step 5: If the import data looks OK, press the Accept button to update your product list. This process can't be un-done.

5. It is important that the **Import Quantity: On Hand Quantity** and **Minimum Quantity** are *not checked if you are importing the same file to existing systems*. Checking this box *will* affect your inventory.
6. 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.

The screenshot shows the 'Product Maintenance' window. At the top, there's a title bar 'Products' and a header 'Product Maintenance'. Below the header, there's a text area with instructions: 'Use the buttons to the right to manage this list. Just click a column header to sort the data. You can also double click an item to edit it. To search for an item, click in the column and type the first few characters - the first matching item will be displayed. You may also filter the data to limit the information that is displayed.'

Below the instructions, there's a 'Filter Products' section with several input fields and buttons:

- 'Description or Phrase' text box
- 'Search Item' dropdown menu
- 'Vendor ID' dropdown menu
- 'Class' dropdown menu
- 'Status' group with radio buttons: ☒ Active, ☐ Inactive, ☐ All
- 'Included' group with radio buttons: ☐ Included, ☐ Non Inc, ☒ All
- 'Billable' group with radio buttons: ☐ Billable, ☐ Non Bill, ☒ All
- 'Apply Filter' button
- 'Clear Filter' button

Below the filter section, there's a table with the following columns: Product ID /, Product Name, Print, Barcode, On Hand Qty, Minimum Qty, Vendor ID, and Manufacturer. The table contains 15 rows of data, mostly 'Hood Clip' items.

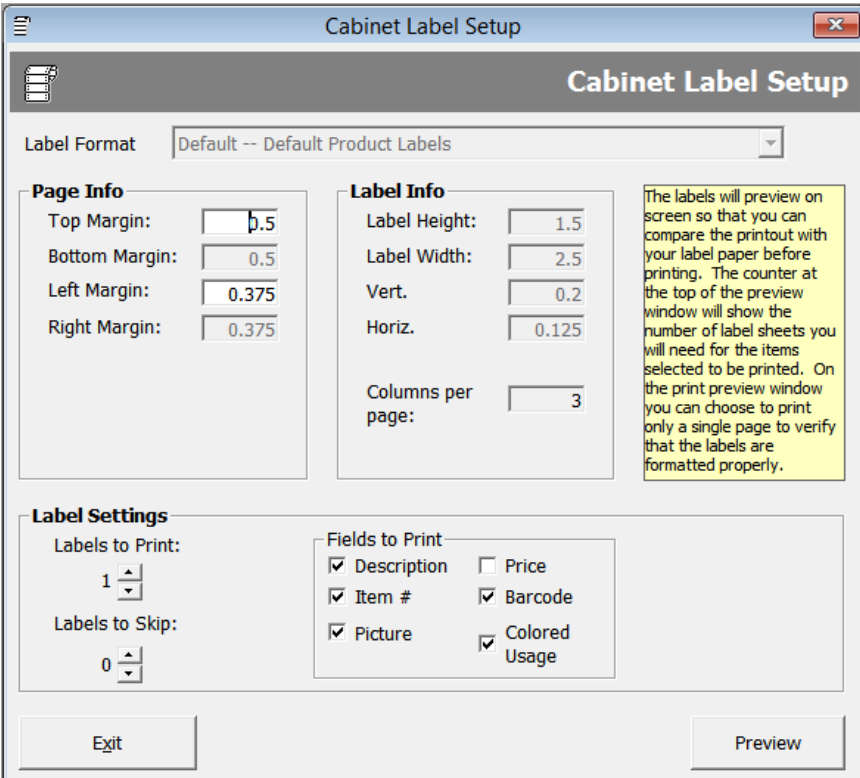
On the right side of the window, there's a vertical stack of buttons: New, Edit, Delete, Duplicate, Find, Select All, Select None, Print Labels, Import, and Exit.

Click on the **Print Labels** button

Select **Print Cabinet Labels** or Print Other from Custom Sized Labels. Click on the **Continue** button.

The screenshot shows the 'Product Label Type' dialog box. It has a title bar 'Product Label Type' and a header 'Product Label Type'. Below the header, there's a group box with two radio buttons: ☒ Print Cabinet Labels and ☐ Print Other Custom Sized Labels. At the bottom, there are two buttons: 'Exit' and 'Continue >'.

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.



Cabinet Label Setup

Label Format: Default -- Default Product Labels

Page Info

Top Margin: 0.5
 Bottom Margin: 0.5
 Left Margin: 0.375
 Right Margin: 0.375

Label Info

Label Height: 1.5
 Label Width: 2.5
 Vert.: 0.2
 Horiz.: 0.125
 Columns per page: 3

The labels will preview on screen so that you can compare the printout with your label paper before printing. The counter at the top of the preview window will show the number of label sheets you will need for the items selected to be printed. On the print preview window you can choose to print only a single page to verify that the labels are formatted properly.

Label Settings

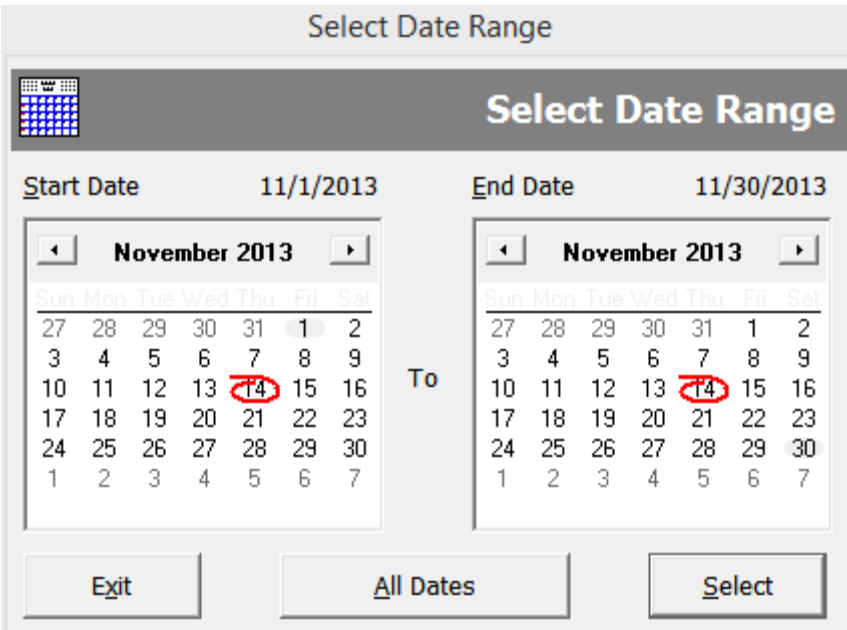
Labels to Print: 1
 Labels to Skip: 0

Fields to Print

☒ Description ☐ Price
☒ Item # ☒ Barcode
☒ Picture ☒ Colored Usage

Exit Preview

If the Colored Usage option is selected, you will be prompted to select a date range. Materials Manager Pro™ 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.



Select Date Range

Start Date: 11/1/2013 End Date: 11/30/2013

November 2013 To November 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

To

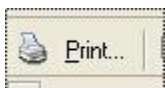
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Exit All Dates Select

A print preview of the labels is provided. The **X** represents no usage data for that product.

BD00673 50 / BOX		BD00675 50 / BOX		BD00677 50 / BOX	
HOOKIT II DISC 6IN P400C		HOOKIT II 6"DA P320 GRIT		X HOOKIT II DISC 6IN P240C	
BD00679 50 / BOX		BD00707 50 / BOX		BD00717 50 / BOX	
X HOOKIT II DISC 6IN P180C		X IMP HOOKIT II 3"D5C P1500		X IMP HOOKIT II 3"D5C P180C	
BD00721 50 / BOX		P210-6285 2 / 2.5LTR		P210-6295 2 / 2.5LTR	
X IMP HOOKIT II 3"D5C P80C		X MID TEMPERATURE HARDENER		X HIGH TEMPERATURE HARDENER	
P210-796 1 / 1 LTR					

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.

Clear Print Checks

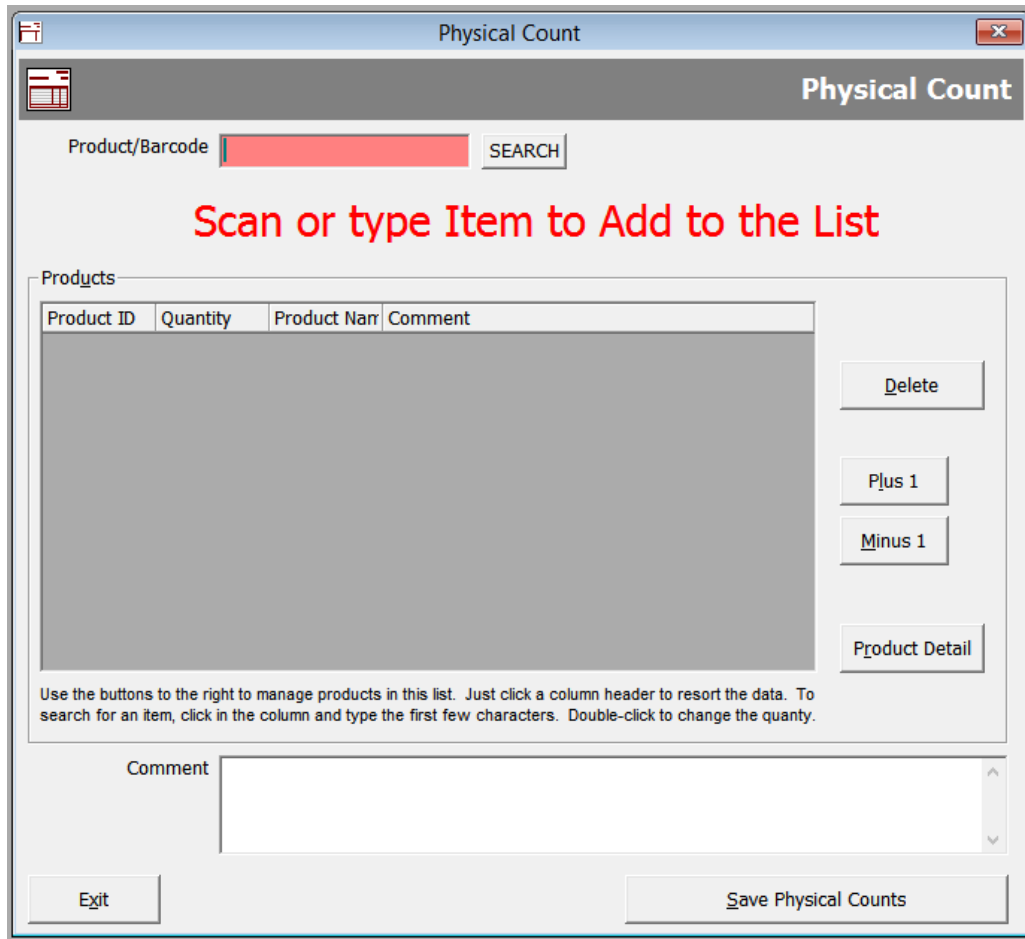
If your labels printed properly - would you like to clear the print check boxes for all products?

Yes

No

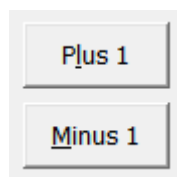
Inventory Adjustments / Physical Count

Select **Adjustments > Physical Inventory** from the Toolbar. The Physical Count window will appear. Either scan in the item's barcode or select **SEARCH** to find the part(s) you wish to adjust the physical counts for.

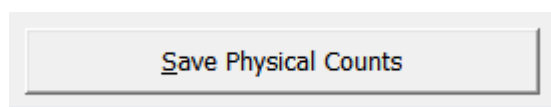


The screenshot shows the 'Physical Count' window. At the top, there's a title bar and a header area with the text 'Physical Count'. Below the header, there's a search bar labeled 'Product/Barcode' with a red input field and a 'SEARCH' button. A large red text prompt says 'Scan or type Item to Add to the List'. Below this is a table with columns 'Product ID', 'Quantity', 'Product Narr', and 'Comment'. To the right of the table are buttons for 'Delete', 'Plus 1', 'Minus 1', and 'Product Detail'. At the bottom of the table area, there's a small text instruction: 'Use the buttons to the right to manage products in this list. Just click a column header to resort the data. To search for an item, click in the column and type the first few characters. Double-click to change the quantity.' Below the table is a 'Comment' text area. At the very bottom, there are 'Exit' and 'Save Physical Counts' buttons.

Click the **Plus 1** or **Minus 1**, or scan the **Barcode Quantity Scan Sheet** (see reports), or double click the line item to type in the quantity of the correct on-hand quantity.

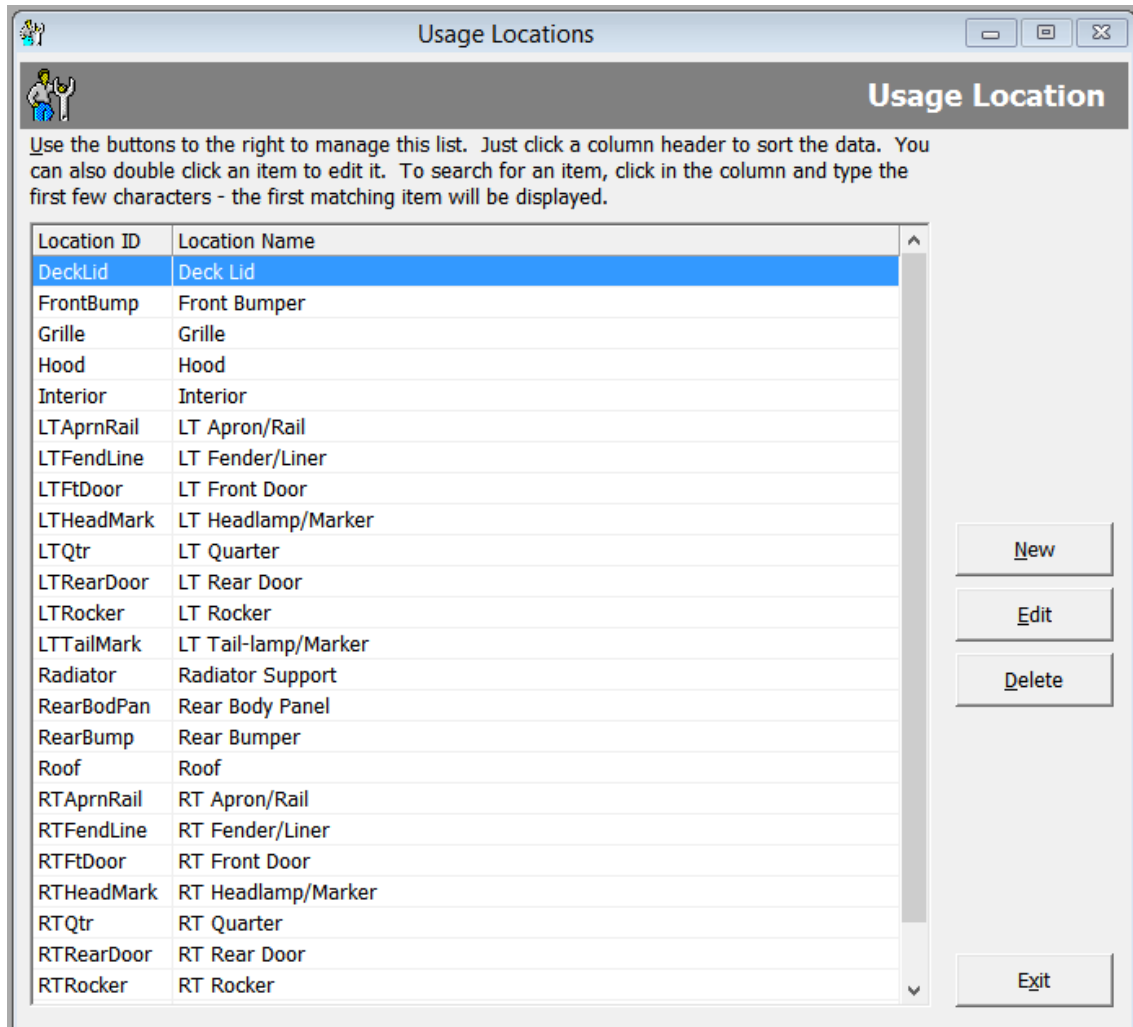


After you have corrected the on-hand quantity for all the parts you wish to adjust, click on the **Save Physical Counts** button to commit the new quantities to the system.

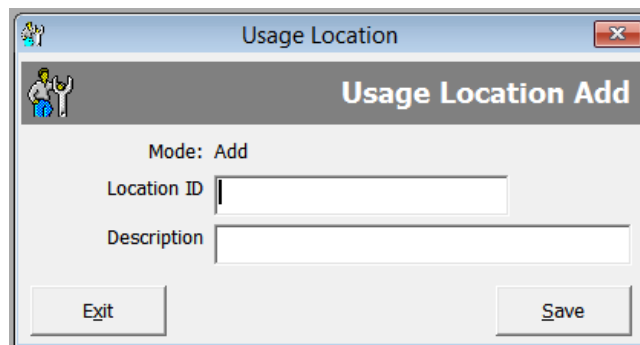


Managing Usage Locations

To manage Usage Locations, click on **Lists > Usage Locations**. To create a new usage location, click on the **New** button.

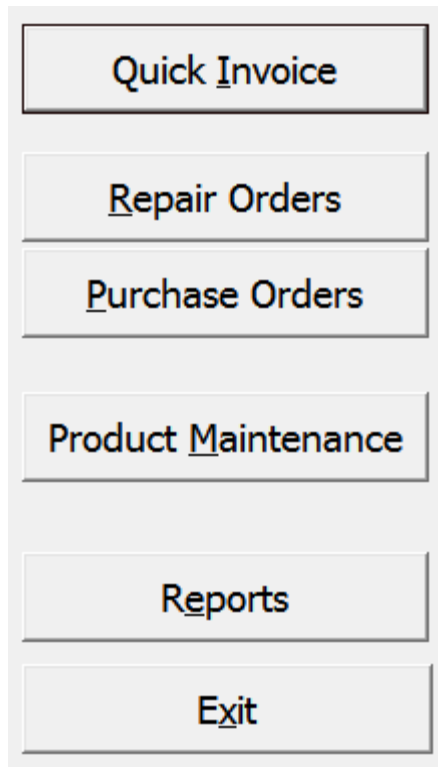


Type in the Location ID and Description and click the **Save** button to save the new usage location.



The Main Menu





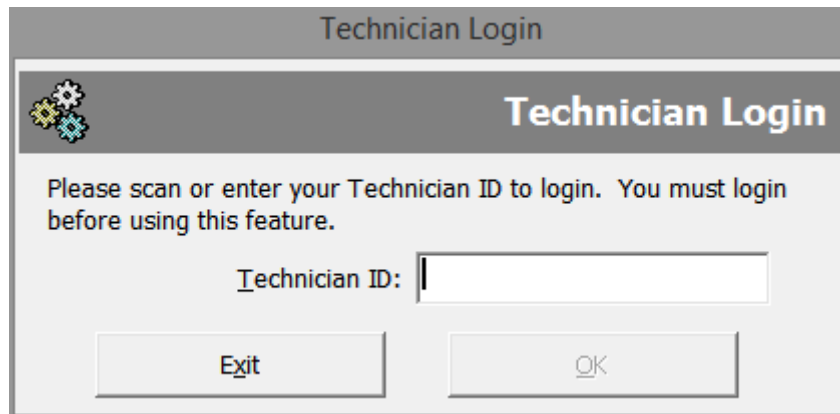
A vertical stack of six rectangular buttons with a light gray background and a thin black border. The buttons are labeled from top to bottom: "Quick Invoice", "Repair Orders", "Purchase Orders", "Product Maintenance", "Reports", and "Exit".

Repair Orders

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



Type in your technician ID



A dialog box titled "Technician Login" with a gray header bar. Below the header is a dark gray bar containing a gear icon and the title "Technician Login". The main area has a light gray background and contains the text: "Please scan or enter your Technician ID to login. You must login before using this feature." Below this text is a label "Technician ID:" followed by a white text input field. At the bottom are two buttons: "Exit" and "OK".

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

Repair Order Add

Mode: Add Date: 6/15/2016
 Bill ID: Status: New

Repair Order ID SEARCH Year Make
 Product / Location / Barcode SEARCH Model
 New Location:

Scan or type Repair Order ID (or button to search)

Products

Product ID	Location ID	Quantity	On Hand	List \$	Ext \$	Billable	Tech ID	Product Name

Delete
 Plus 1
 Minus 1
 Product Detail

Total List \$ 0.00

Use the buttons to the right to manage products on this Repair Order. Just click a column header to resort the data. To search for an item, click in the column and type the first few characters. Double-click to change the quantity or location.

Exit Clear Print Save

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.

Please select the desired item from the following list. Just click a column header to resort the data. You can also double click and edit it. To search for an item, click in the column and type the first few characters - the first matching item will be displayed.

Product ID	Product Description	On Hand	Barcode	Manufacturer	Product Line
BD00673	HOOKIT II DISC 6IN P400C	46		3M	CDN SUNDRIES
BD00675	HOOKIT II 6"DA P320 GRIT	48		3M	CDN SUNDRIES
BD00677	HOOKIT II DISC 6IN P240C	50		3M	CDN SUNDRIES
BD00679	HOOKIT II DISC 6IN P180C	1		3M	CDN SUNDRIES
BD00707	IMP HOOKIT II 3"DSC P1500	2550		3M	CDN SUNDRIES
BD00717	IMP HOOKIT II 3"DSC P180C	250050		3M	CDN SUNDRIES
BD00721	IMP HOOKIT II 3"DSC P80C	50		3M	CDN SUNDRIES
BD00730	HKTII AIR FILE P80E D-F	50		3M	CDN SUNDRIES

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

Scan or type Item or Location to use on Repair Order

Products

Product ID	Location ID	Quantity	On Hand	List \$	Ext \$	Billable	Tech ID	Product Name
BD00707		1	2550	12.95	12.95	<input type="checkbox"/>	TKW	IMP HOOKIT II 3"DSC P1500
BD00801		1	25	12.95	12.95	<input type="checkbox"/>	TKW	HKT II 2-3/4"x16-1/2"P80E
BD02023		1	50	12.95	12.95	<input checked="" type="checkbox"/>	TKW	WETORDRY 51/2"x9"1500A

Delete

Plus 1

Minus 1

Product Detail

Click on the **Plus 1**, **Minus 1**, or double click on the product to adjust the quantity needed for the repair order. You can also scan from the barcode quantities sheet.

Repair Order Product Quantity

RO Edit Product

Product: Nylon Push Clip

Quantity

Minus 1

Plus 1

Usage Location

Lookup

Exit

Save

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.

Repair Order Product Quantity

RO Edit Product

Product: Nylon Push Clip

Quantity

Minus 1

Plus 1

Usage Location

Lookup

Exit

Save

Select Usage Location

Please select the desired item from the following list. Just click a column header to resort the data. You can also double click an item to edit it. To search for an item, click in the column and type the first few characters - the first matching item will be displayed.

Location ID	Location Name
DeckLid	Deck Lid
FrontBump	Front Bumper
Grille	Grille
Hood	Hood
Interior	Interior
LTAprnRail	LT Apron/Rail
LTFendLine	LT Fender/Liner
LTftDoor	LT Front Door
LTHeadMark	LT Headlamp/Marker
LTQtr	LT Quarter
LTRearDoor	LT Rear Door
LTRocker	LT Rocker
LTTailMark	LT Tail-lamp/Marker
Radiator	Radiator Support
RearBodPan	Rear Body Panel
RearBump	Rear Bumper
Roof	Roof
RTAprnRail	RT Apron/Rail

Exit

Find

Select

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 and deplete the item(s) used from inventory. The Repair Order cannot be edited after printing.



The printed Job Ticket / Invoice

Tim Testing data
123 Main
Fishers IN 46037
888-888-8888
Fax: 480-275-3048

Job Ticket/Invoice

Repair Order ID: 5551212
Bill ID: 7
Repair Order Date: 11/23/2009 9:27:18 AM

Status: Printed

Item	Qty	Description	Tech ID	Location	List	Extended
BD00673	1	HOOKIT II DISC 6IN P400C	TKW	RearBump	12.95	\$ 12.95
BD00675	1	HOOKIT II 6"DA P320 GRIT	TKW	RTftDoor	12.95	\$ 12.95
Total:						\$ 25.90

Repair Orders

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

Repair Orders

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.

Purchase Orders

The Purchase Orders window appears. From here, you can view purchase orders in the creation phase (Saved but not yet ordered), Open (Saved and ordered, but not yet received), or closed (saved, ordered, and received)

Use the buttons to the right to manage this list. Just click a column header to sort the data. You can also double click an item to edit it. To search for an item, click in the column and type the first few characters - the first matching item will be displayed.

Purchase Order ID	Date	Vendor	Status	Total Cost	Technician
-------------------	------	--------	--------	------------	------------

Status

- ☒ Creation
- ☐ Open
- ☐ Closed
- ☐ All

Auto Order

New

Edit

Delete

Order & Print

Exit

The **Auto Order** button will automatically generate a purchase order by looking at the On Hand Quantities and comparing it to the Reorder point. It will then generate a purchase order for the suggested quantity based on unit size.



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



The **Edit** button will edit an existing purchase order that is still in the creation phase.



The **Delete** button allows you to delete a purchase order that is still in the creation phase.



The **Order & Print** button takes a purchase order currently in the creation phase and finalizes the purchase order into the open status and prints the purchase order.



The **Confirmations** button will show confirmations for any open or closed orders that are being synced to a vendor's ordering system.



New Order

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

PO Create

This window allows you to create a new purchase order. Type in the PO ID you want to assign (duplicates are not permitted). Use the barcode scanner or keyboard to enter the Vendor ID and each of the products you want to order. Each product is added to the grid with a suggested order quantity. You may edit the Order Quantity directly in the grid.

PO ID:

Vendor ID:

Product/Barcode:

Date: New
Technician:

Enter a new PO ID (no duplicates)

Product ID	Product Name	On Hand Qty	Minimum Qty	Prior Ordered	Order UOM	Unit Size	Qty To Order	Unit Cost	Ext. Cost
------------	--------------	-------------	-------------	---------------	-----------	-----------	--------------	-----------	-----------

Total Order Cost \$ 0.00

Type in a PO ID and select a Vendor ID

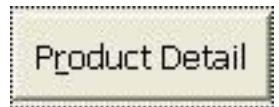
Scan, Type, or **SEARCH** for part(s) you would like to order. Double click on the parts, or press the **Select** button to add the item(s) to the order.

Select Product

Please select the desired item from the following list. Just click a column header to resort the data. You can also double click an item to edit it. To search for an item, click in the column and type the first few characters - the first matching item will be displayed.

Product ID	Product Description	Barcode
AES26112	1/8 STUBBY DRILL BITS	AES26112
AMRTM27	50MM HI TRIM MASK TAPE ROLL	AMRTM27
AST1721	SPOT WELD DRILL BITS, 8MM	AST1721
AST32	PINSTRIPE REMOVAL KIT	AST32
AST400E	TAN PIN-STRIPE REMOVAL PAD	AST400E
AST557003	500LBS PORTABLE WORK STAND	AST557003
ASTASMS2	MASKING STATION -TREE TYPE	ASTASMS2
ATD16800P	WATERBRNE 2-DRYER GUNS W/STAND	ATD16800P
ATD5019	ROTARY PUMP PLASTIC	ATD5019
ATD8209	3/8 X 25 AIR HOSE	ATD8209
ATD8210	3/8 X 50 AIR HOSE	ATD8210
ATD9204	1/8IN TITANIUM DRILL BITS	ATD9204
BK7821077	20 A MAXI-FUSE	BK 7821077
BK7821078	30A MAXI-FUSE	BK 7821078
BK7821079	40 A MAXI-FUSE	BK 7821079
BK7821085	50 A MAXI-FUSE	BK 7821085
BK7821086	60A MAXI-FUSE	BK 7821086
BK7821104	3A ATC FUSE	BK 7821104

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



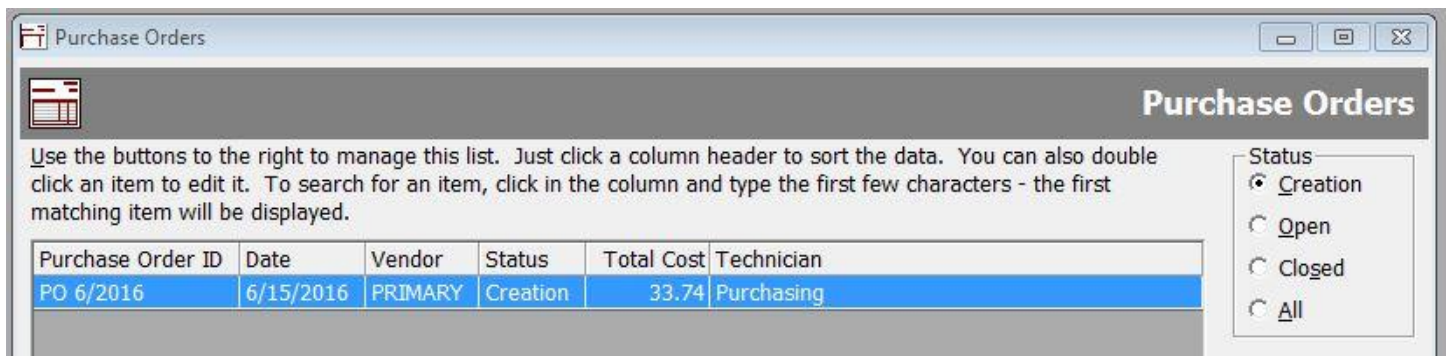
Adjust the quantities to order by double clicking the *Qty to Order* field.

	Qty To Order	Unit
0	25	26.
1.00		27.

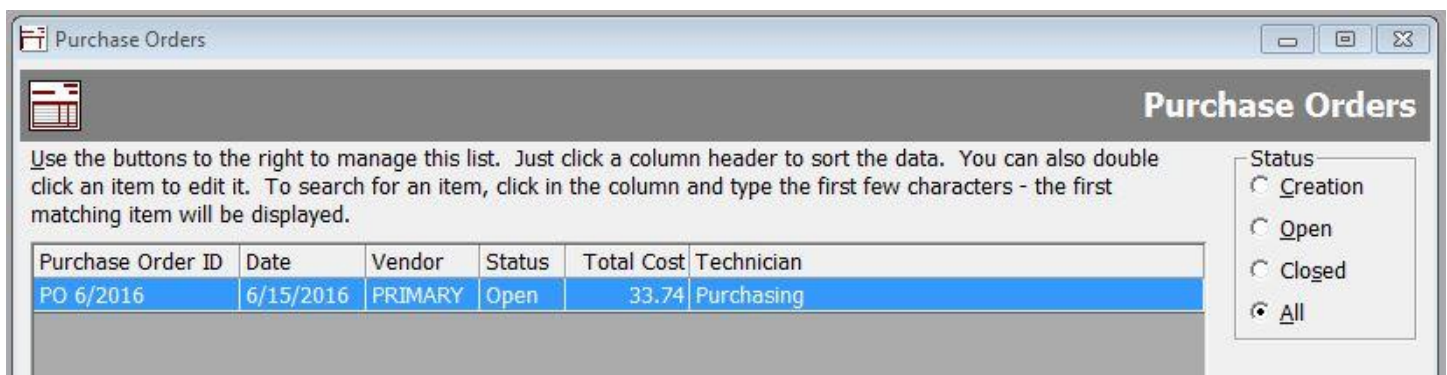
If you would like to save the order but not finalize, click the **Save but Don't Order** button. If you are ready to finalize the order, click the **Save and Order Now** button.



Orders saved but not yet ordered will show in the creation status

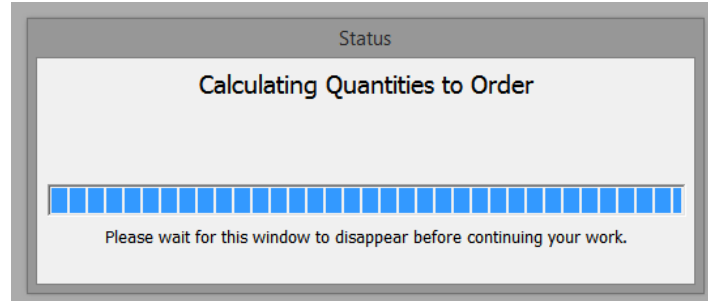


Orders saved and ordered will show in the open status



Auto Order

Click on the **Auto Order** button. The system will calculate quantities to order.



Verify the parts you want to order are listed. If desired, double click on the **Qty to Order** field to adjust the quantity you wish to order. Click on the **Order Now** button to continue.

PO Auto Order

This window displays all products that need to be ordered. You can change the quantity to order (set to 0 to not order) and then create multiple purchase orders - one for each vendor. You can sort the list by vendor ID by clicking on the column header.

Filter Products

Description or Phrase

Vendor ID

Show

☐ All Products ☒ Only To Order ☐ Blank Vendor ID

Product ID	Product Name	On Hand Qty	Minimum Qty	Prior Ordered	Order UOM	Unit Size	Qty To Order	Unit Cost	Ext. Cost	Vendor ID	V
10010	Hood Clip	-1.00	0.00	0.00	PK	15.00	1.00	0.8333	12.50	PRIMARY	P
10011	Hood Clip	-1.00	0.00	0.00	PK	25.00	1.00	0.4368	10.92	PRIMARY	P
10012	Hood Clip	-1.00	0.00	0.00	PK	50.00	1.00	0.1648	8.24	PRIMARY	P

Click on the **Order Now** button to finalize the order.

Receiving an open Purchase Order

To receive items against a purchase order, double click on an open purchase order to bring up the PO Receipt window.

Scan the barcode to select the item in the purchase order. Double click the **Qty Received** field and adjust the quantity received.

PO Receipt

This window allows you to receive one or more items on an open purchase order. You can directly enter the receipt quantity into the grid. You may double click on the Order Quantity to receive all of an item. If you are receiving the entire PO in full press the Receive All button. To remove an item from backorder enter a 0 into the backorder column. You can also scan the items to receive them. To change a receipt price enter the new price into the grid (unit cost only).

PO ID PO 6/2016 Date: 6/15/2016
Vendor ID PRIMARY PRIMARY Technician: 01 - Purchasing

Product/Barcode


Scan or type Item to Receive it

Product ID	Product Name	Order UOM	Unit Size	Unit Cost	Qty Ordered	Order Cost	Qty Received	Qty Backordered	Receipt Cost
10001	Hood Clip	PK	25.00	0.2160	1.00	5.40	0.00	1.00	0.00
10002	Hood Clip	PK	25.00	0.2844	1.00	7.11	0.00	1.00	0.00
10003	Hood Clip	PK	25.00	0.5116	1.00	12.79	0.00	1.00	0.00
10004	Hood Clip	PK	25.00	0.1444	1.00	3.61	0.00	1.00	0.00
10005	Hood Clip	PK	25.00	0.1932	1.00	4.83	0.00	1.00	0.00

Total Order Cost \$ 33.74 Total Receipt Cost \$ 0.00

Alternatively, you can click the **Receive All** button to receive all items on the purchase order. You will receive a confirmation window. Click on **Yes** to confirm receipt of all items on the purchase order.

Receive All?

 Do you want to receive all items on this purchase order (and close the purchase order)?

Click on the **Save** button to save the PO receipt.



Returning Items to Vendor

Select **Adjustments, Return to Vendor** from the toolbar. Select the Vendor ID, then barcode scan or select **SEARCH** to find the part(s) you wish to return. Click the **Plus 1** or **Minus 1**, or scan the **Barcode Quantity Scan Sheet** (see reports), or double click the line item to type in the quantity you wish to return. When finished, click on the **Save and Return to Vendor** button to complete the return.

Return to Vendor

Return to Vendor

Vendor ID

Product/Barcode

Scan or type the Vendor ID

Products

Product ID	Unit Quantity	Product Name
------------	---------------	--------------

Use the buttons to the right to manage products in this list. Just click a column header to resort the data. To search for an item, click in the column and type the first few characters. Double-click to change the quantity.

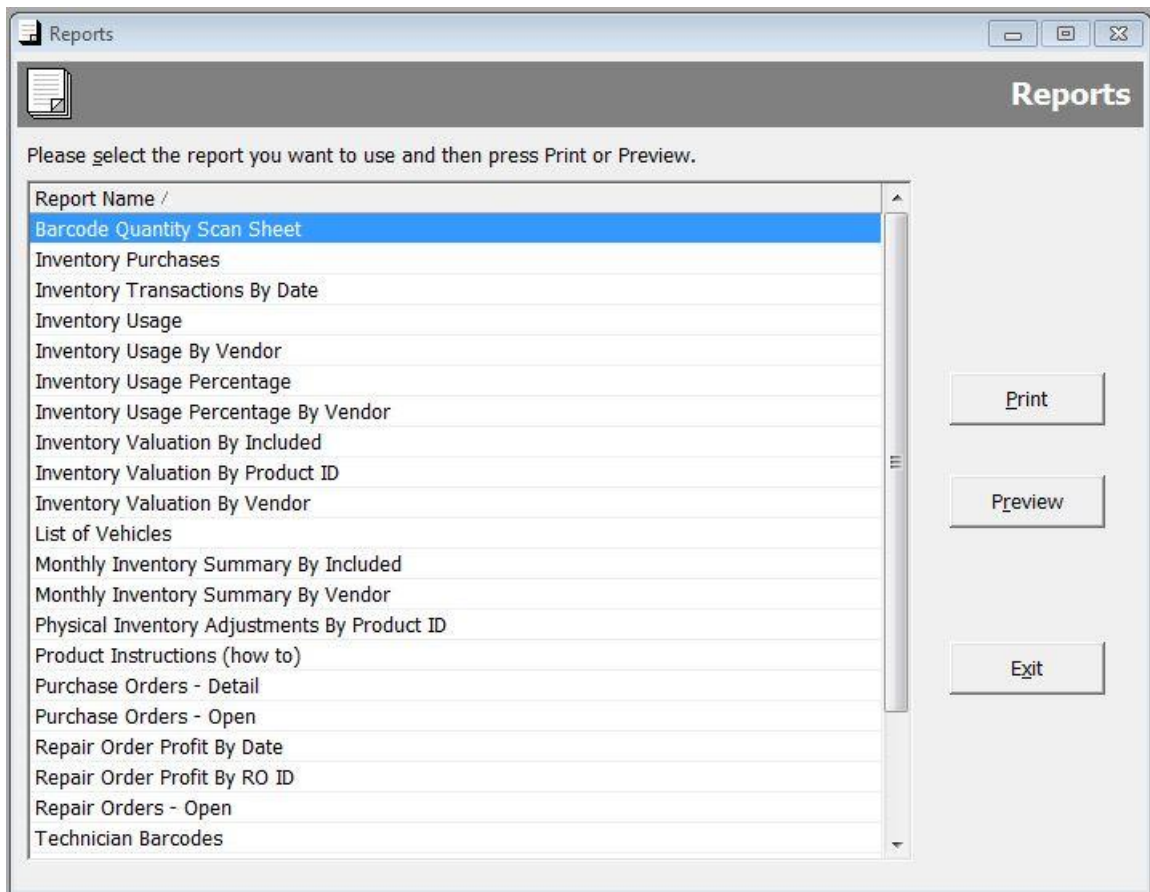
Comment

Reports

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

Reports

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



Demo
123 Street
123 City 123 State 12345
123-45-6789

6/15/2016

Inventory Usage

Date Range: 1/1/1900 - 1/1/2200

Product ID	Product Name	Vendor ID	Class	Qty	Total Cost
10001	Hood Clip	PRIMARY	CLIPS	1	0.22
10002	Hood Clip	PRIMARY	CLIPS	2	0.57
10003	Hood Clip	PRIMARY	CLIPS	3	1.53
10004	Hood Clip	PRIMARY	CLIPS	4	0.58
10005	Hood Clip	PRIMARY	CLIPS	1	0.19

Contains info from both open and closed ROs

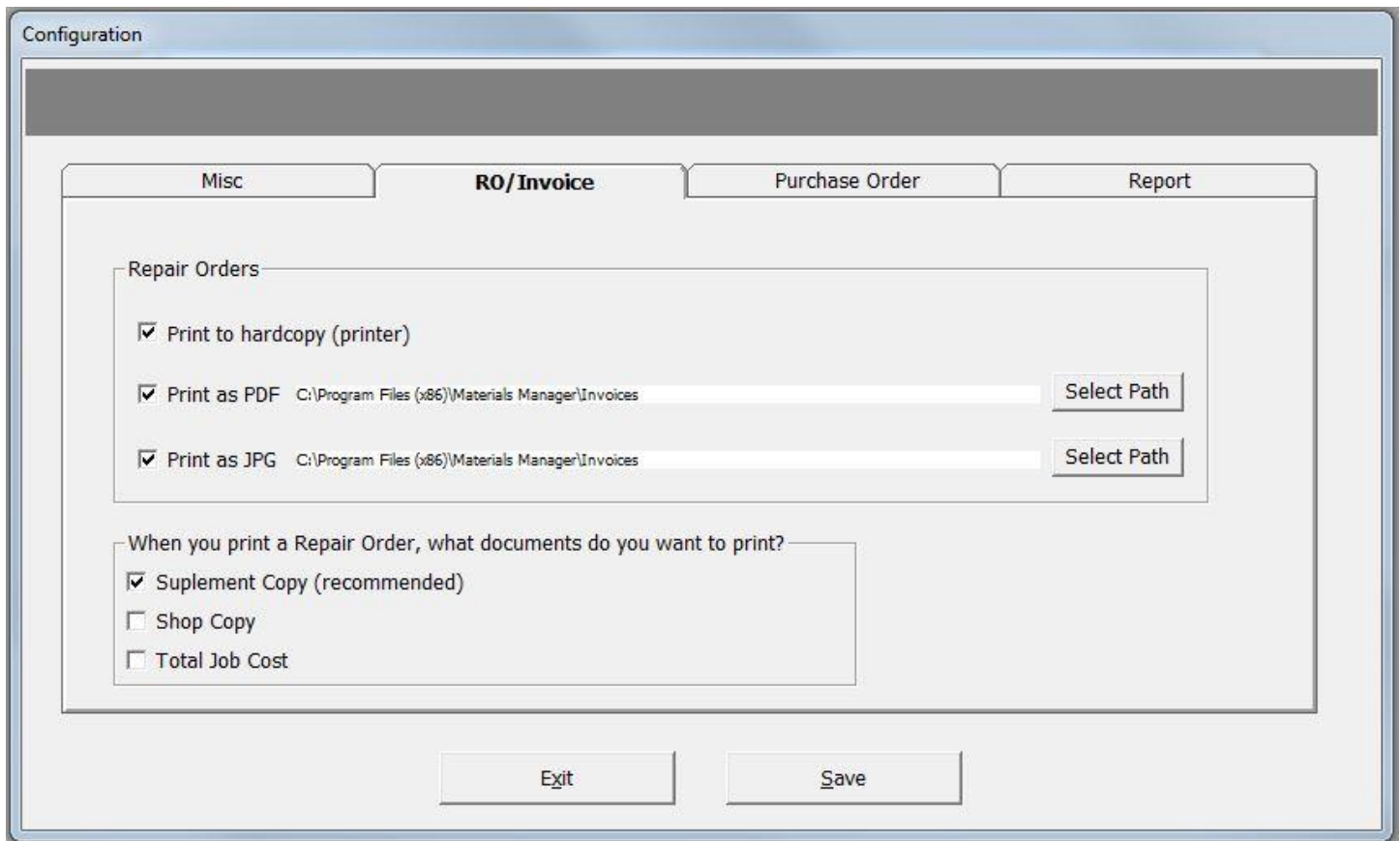
Totals: 11 3.09

Printing Features

Materials Manager contains many options for your printing needs. The option to print a hardcopy or export to a PDF/JPG are options that can be turned on or off within the **Tools > Options** menu. These options can be applied to RO/Invoice, PO's, and Reports. This allows the ability to keep electronic records and save resources such as ink and paper.

Simply check the box of the feature you wish to use and click **Save**. By default, Materials Manager saves PDF/JPG exports to C:\Program Files (x86)\Materials Manager\Invoices,\Purchase Orders,\Reports. This can be modified to export to a directory of your choosing.

You can also choose to print/export a copy of your Supplement Cost, Shop Cost, and Total Job cost.



Security Controls

With Materials Manager, you can keep an extended log of which technicians are logging specific features of the program. This can be access under **Tools > Options**.

The Administrative Options can be used to control what areas of the program require a Tech Log-In. By default, the password is "**Admin**" without the quotes. This password can be reset by clicking the **Reset Password** button to a password of your choosing. Simply, check or uncheck the box to apply the settings.

Configuration

Misc RO/Invoice Purchase Order Report

☐ Enable Extended Logging

Barcode Size

☒ Small / Normal

☐ Medium

Administrative Options

☒ Require Tech Log-In to Purchase Orders

☒ Require Tech Log-In to Repair Orders

☒ Require Tech Log-In to Product Maintenance

☒ Require Tech Log-In to Reports

Set Options Reset Password

Exit Save

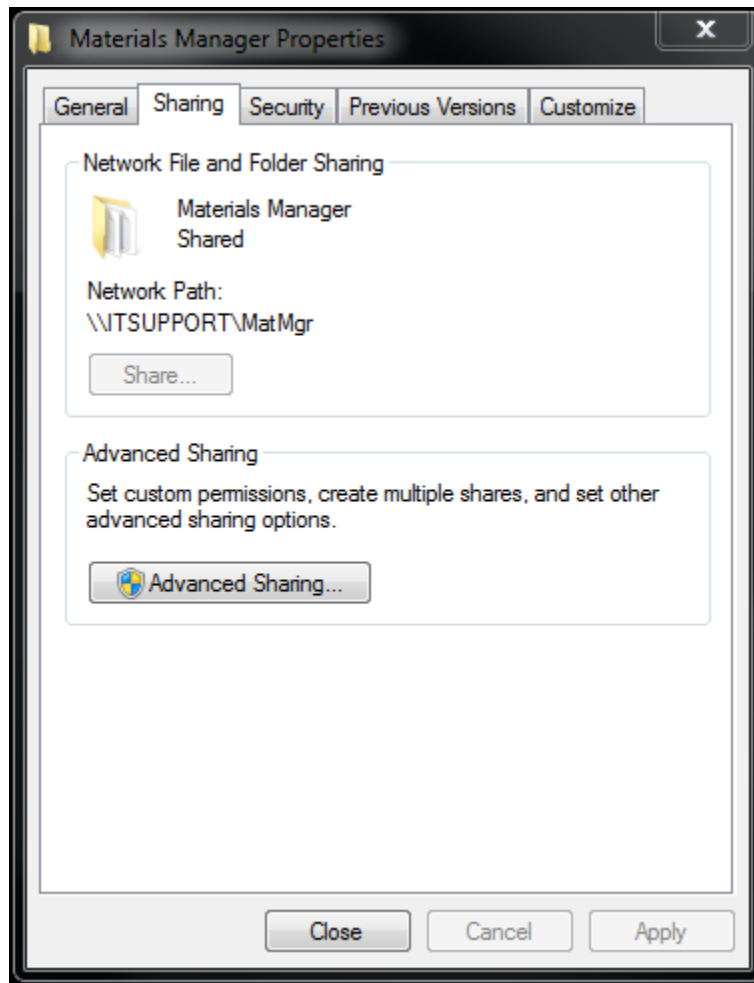
Materials Manager Networking Guide

Please note: ALL machines will need to be running the same version of Materials Manager for this process to be successful. These instructions work for both Materials Manager Lite and Pro.

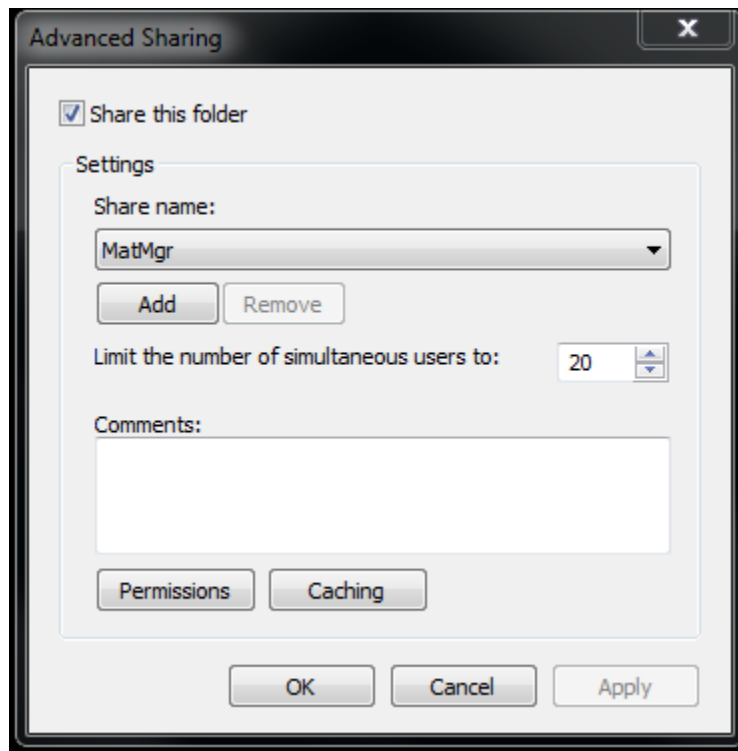
On the host (server) machine:

Share the C:\Program Files (x86)\Materials Manager folder.

- **Right-click** on the **Materials Manager folder** and select **Properties** from the context menu.
- Click on the **Sharing Tab**

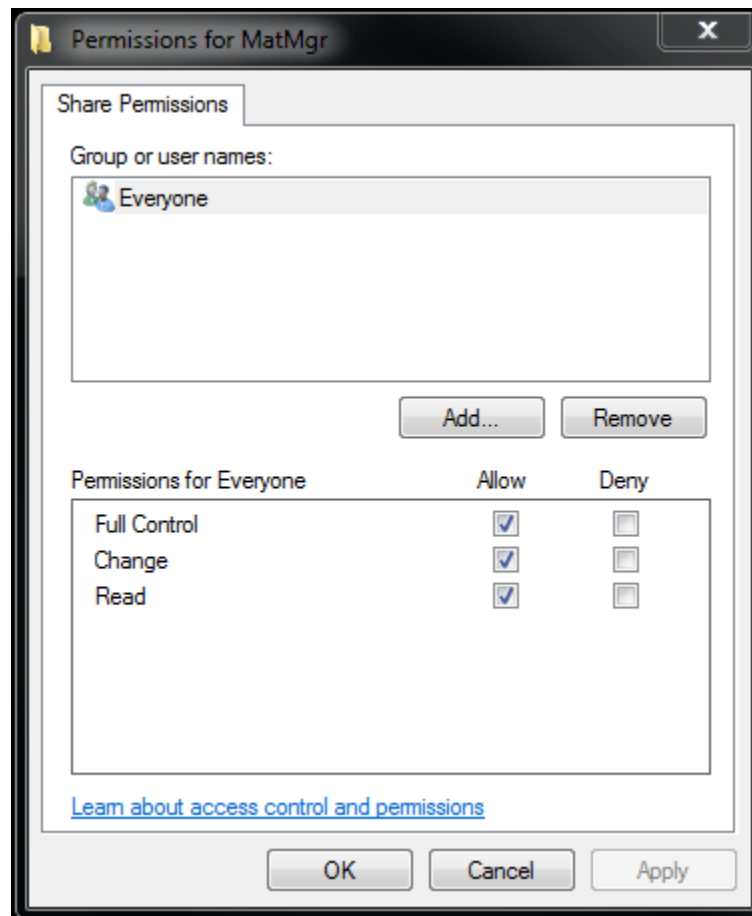


- Click **Advanced Sharing...**
- Check the box for **Share this folder**.



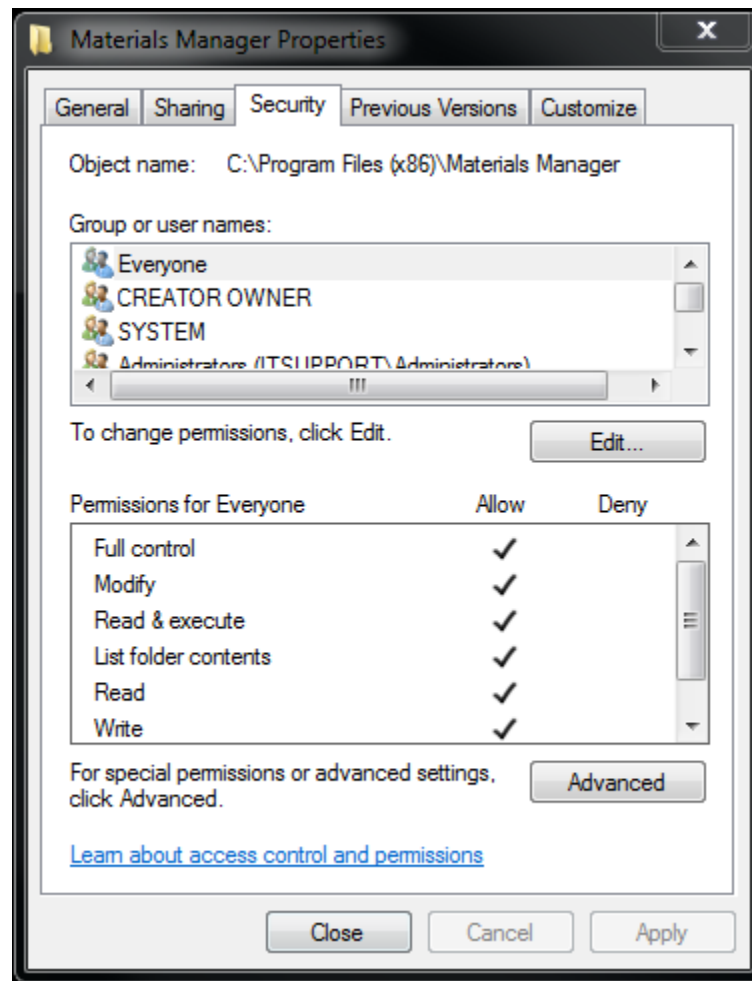
- Set the Share name: to **MatMgr**
- Click **Apply**

- Click **Permission**
- Set Everyone Group to have **Full-Control**



- Click **Apply**
- Click **OK**

- Click the **Security** Tab
- Set Everyone Group to have **Full-Control**

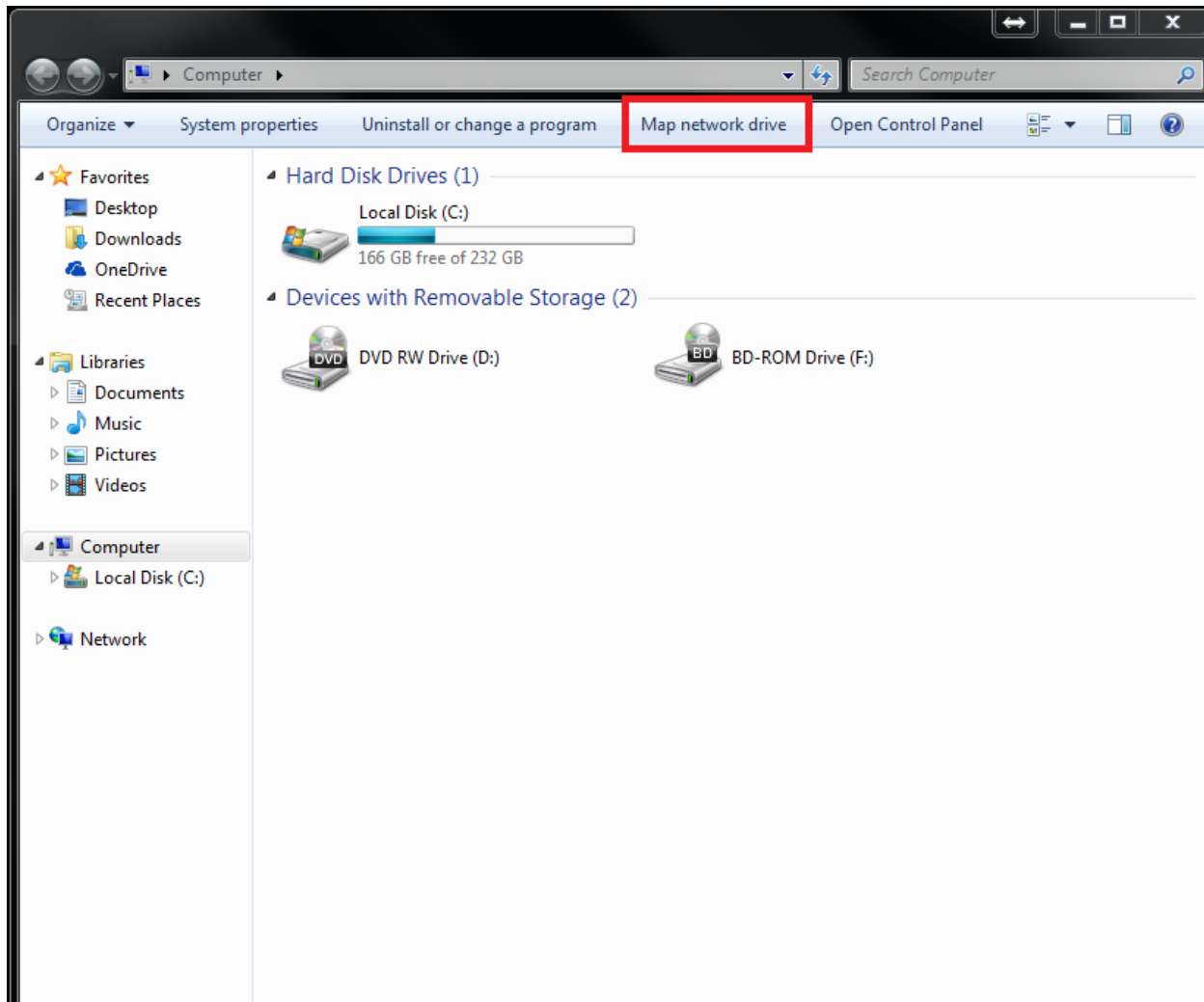


- Click **Apply**
- Click **OK**

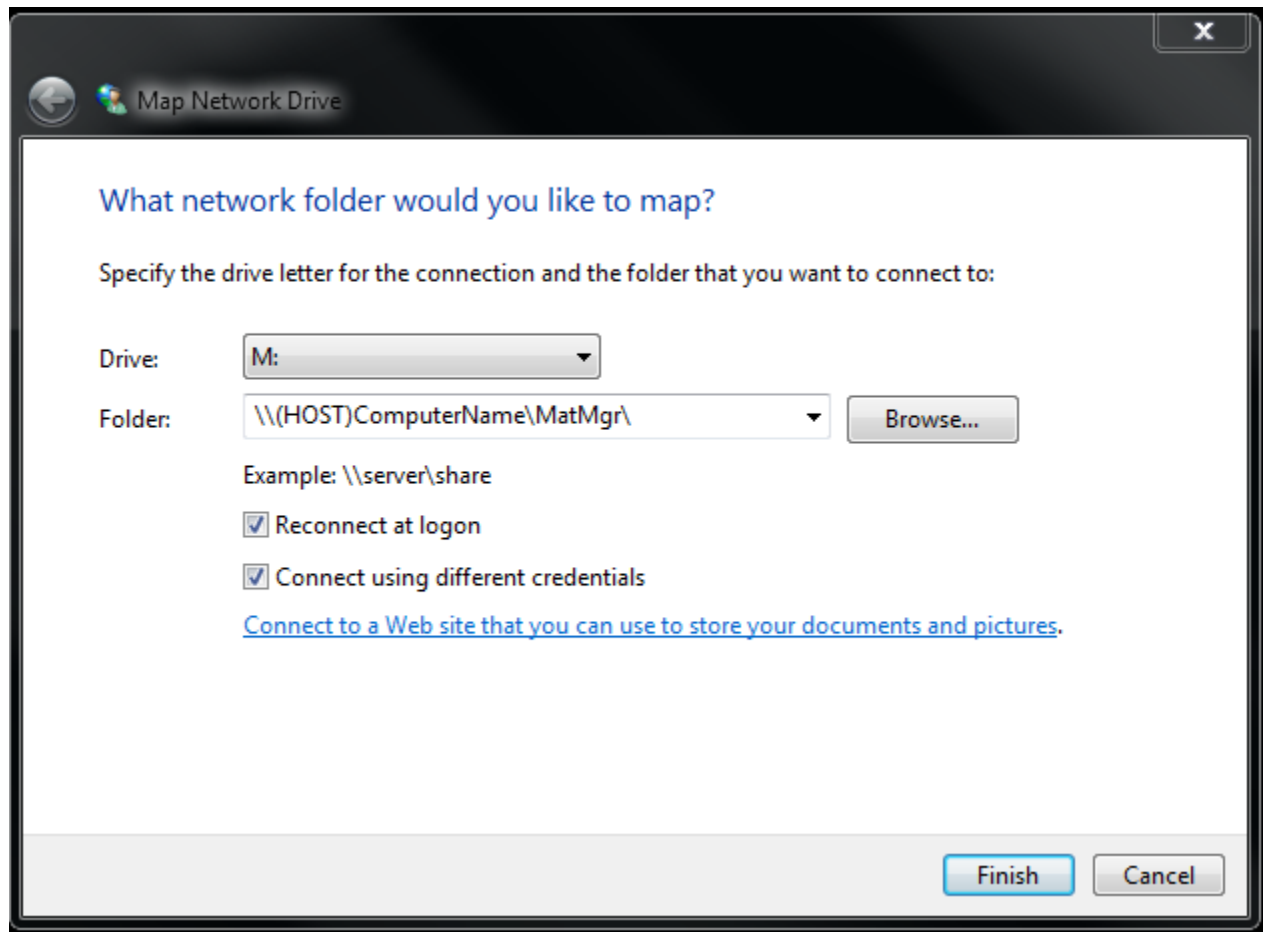
*At this point you are ready to move on to the client machine(s). Please note, in some cases, Windows will prompt you to authenticate to the host (server) machine. If this occurs, create an Administrator account with a password. Call this account whatever you want. This will be used for authenticating when mapping the network drive. **If you do not give the account a password the process will not work!***

On the client machine(s):

- Click the **Start Button**
- Click **Computer**
- Click **Map network drive**



- Select a Drive letter, we *recommend M:*
- Navigate to shared folder by clicking **Browse...** or typing in the computer name. (See picture below)



- Click **Finish**

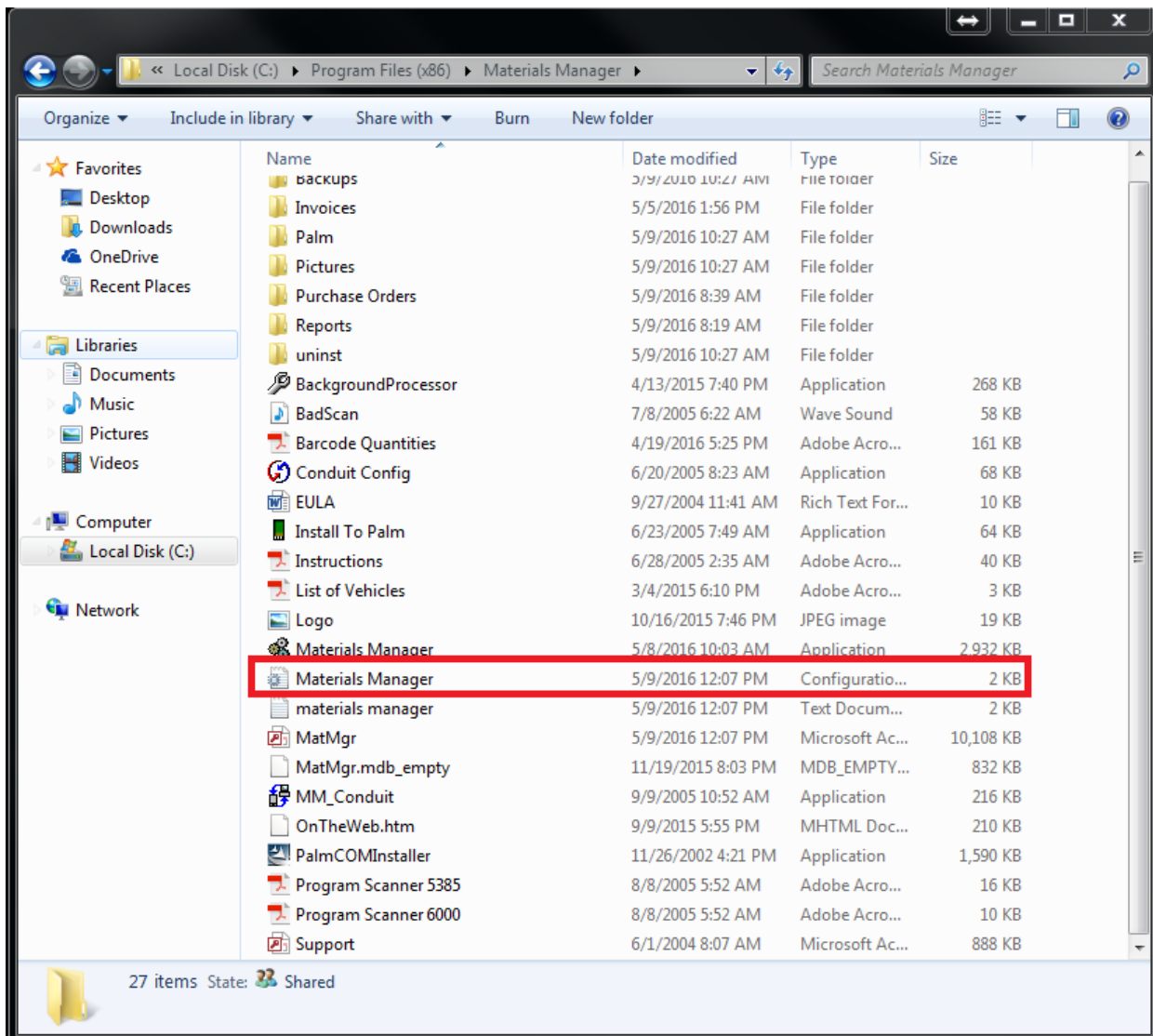
*Check the box **Connect using different credentials:**

(This will be used with the account you created earlier)

Username: (Host)ComputerName\\username

Password: Whatever Password You Used

Once the drive is mapped you will need to modify the .ini (configuration file) in: C:\Program Files (x86)\Materials Manager



- Double-click the file to open it

- The file will open in Notepad

```
[Program]
Name=Materials Manager
PCPDAFile=Materials_Manager.prc
Process=5E9X+1F51v93d7G/aRojCQ==
ConduitName=Materials Manager
CreatorID=Up18
ConduitEXE=MM_Conduit.exe
RegistryPath=Software\Materials Manager\
Version=5.16.508
[Files]
LogFile=c:\program files (x86)\materials manager\materials manager.log
DatabaseFile=c:\program files (x86)\materials manager\MatMgr.mdb
BackupFolder=c:\program files (x86)\materials manager\Backups\
[PgmStatus]
RunState=0
[Backup]
LastBackup=5/9/2016 10:27:54 AM
[EULA]
Agree=1
Date=5/9/2016 10:28:00 AM
[ROPrintFormat]
Shop=0
Supplement=1
JobCost=0
[Barcode]
Size=0
[Log]
Extended=0
[PrintHardCopy]
ROHardCopy=1
POHardCopy=1
ReportHardCopy=0
[PrintToPDF]
ROToPDF=1
ROpdfpath=C:\Program Files (x86)\Materials Manager\Invoices
POToPDF=1
POpdfpath=C:\Program Files (x86)\Materials Manager\Purchase Orders
ReportToPDF=1
Reportpdfpath=C:\Program Files (x86)\Materials Manager\Reports
[PrintToJPEG]
ROToJPG=1
ROjpgpath=C:\Program Files (x86)\Materials Manager\Invoices
POToJPG=1
POjpgpath=C:\Program Files (x86)\Materials Manager\Purchase Orders
ReportToJPG=1
Reportjpgpath=C:\Program Files (x86)\Materials Manager\Reports
[RequireLogIn]
PO=1
RO=1
ProdMain=1
Report=1
```

- Locate DatabaseFile=c:\program files (x86)\materials manager\MatMgr.mdb
- Change this to read: M:\MatMgr

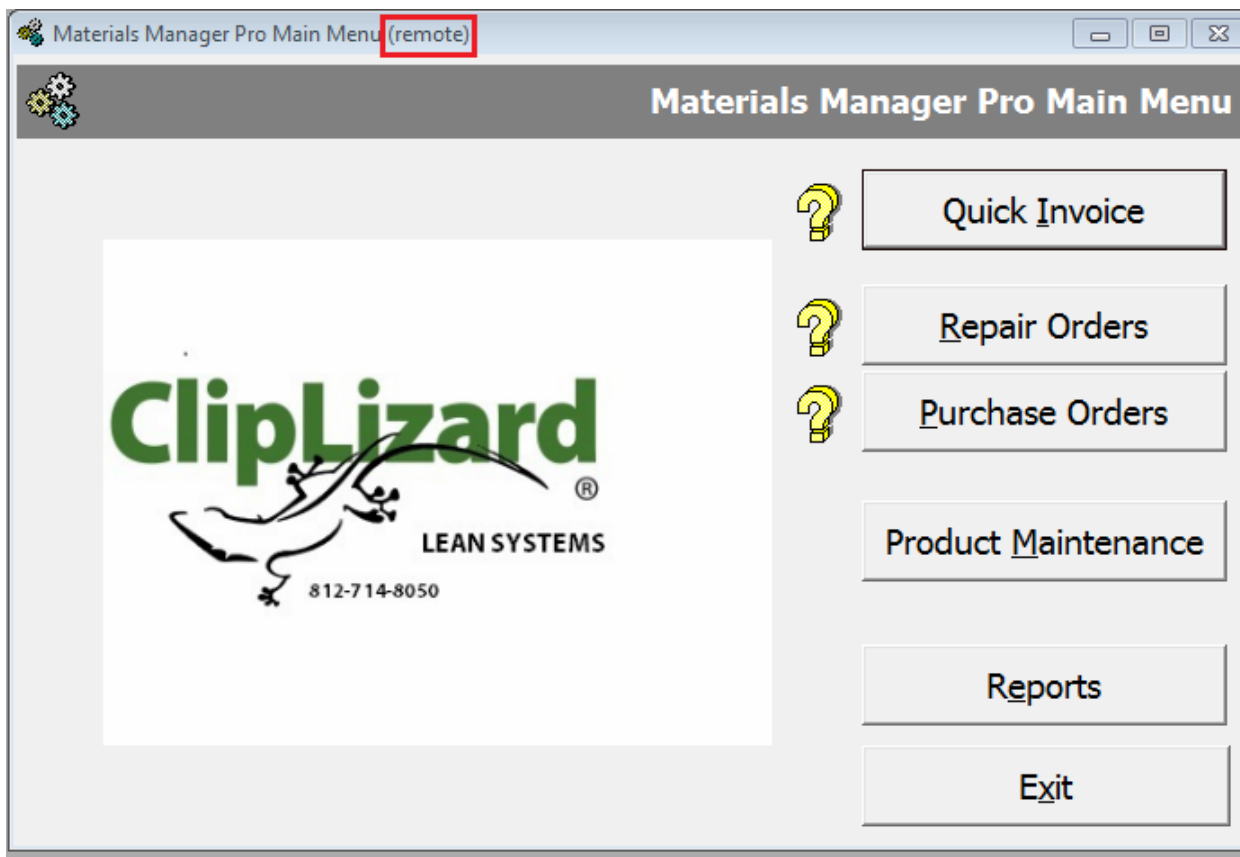
Note: M: is whatever letter you gave to the mapped network drive

Finished product should look like the picture below:

```
[Program]
Name=Materials Manager
PCPDAFile=Materials_Manager.prc
Process=5E9X+1F51v93d7G/aROjCQ==
ConduitName=Materials Manager
CreatorID=Up18
ConduitEXE=MM_Conduit.exe
RegistryPath=Software\Materials Manager\
Version=5.16.508
[Files]
LogFile=c:\program files (x86)\materials manager\materials manager.log
DatabaseFile=M:\MatMgr.mdb
BackupFolder=c:\program files (x86)\materials manager\Backups\
[PgmStatus]
RunState=0
[Backup]
LastBackup=5/9/2016 10:27:54 AM
[EULA]
Agree=1
Date=5/9/2016 10:28:00 AM
[ROPrintFormat]
Shop=0
Supplement=1
JobCost=0
[Barcode]
Size=0
[Log]
Extended=0
[PrintHardCopy]
ROHardCopy=1
POHardCopy=1
ReportHardCopy=0
[PrintToPDF]
ROToPDF=1
ROpdfpath=C:\Program Files (x86)\Materials Manager\Invoices
POToPDF=1
POpdfpath=C:\Program Files (x86)\Materials Manager\Purchase Orders
ReportToPDF=1
Reportpdfpath=C:\Program Files (x86)\Materials Manager\Reports
[PrintToJPEG]
ROToJPG=1
ROjpgpath=C:\Program Files (x86)\Materials Manager\Invoices
POToJPG=1
POjpgpath=C:\Program Files (x86)\Materials Manager\Purchase Orders
ReportToJPG=1
Reportjpgpath=C:\Program Files (x86)\Materials Manager\Reports
[RequireLogIN]
PO=1
RO=1
ProdMain=1
Report=1
```

- **Save** your changes
- **Run** Materials Manager

If done correctly, Materials Manager will show Materials Manager (remote).



- Check your list of Technicians to make sure the list is populating
- Check Product Maintenance, you should see product
- Check Repair Orders, any repair orders will show up

Congratulations! You have successfully networked Materials Manager!

Support Information

For support of Materials Manager™ please contact:

Email: helpdesk@cliplizard.com

Website: www.cliplizard.com

ClipLizard Systems, LLC®.
2250 Wood Drive
Spencer, IN 47460

Phone: 812-714-8050