



Release Notes

This booklet provides an overview of the new features and capabilities that are incorporated into MOTOR Shop Director Version 7. Since our last major release, Version 5.5, we have made over 500 changes to MOTOR Shop Director including suggestions from you, various enhancements and adjustments. Each year we find that some worthy suggestions must be postponed for a future version as we prioritize those improvements that will have the largest benefit upon our thousands of users. This new version can have a substantial impact on how the MOTOR Shop Director software system contributes to your shop's success. To fully benefit from the substantial improvements, we highly recommend that you read this document thoroughly.

Summary of New Features

New Look and Feel	Track Marketing Source by WO
Text Messaging	Attach PDFs to Vehicle Record
PDF Integration	Easier Multi Window Navigation
New Scheduler List View	Advanced Search Capabilities
42,000 Localities Database	Optional Premium Parts Catalogs (Activant, NAPA and IAP)
Up to 35 Sales Tax Rates	Import Jobs from Closed WOs
Up to 8 Estimating Options	Batch Work Order Printing
New Searchable Help System	New Sublet Report by Vendor
Standard Task Appointments	And much more ...
USB Cash Drawer Integration	

1. New Look and Feel – We have given MOTOR Shop

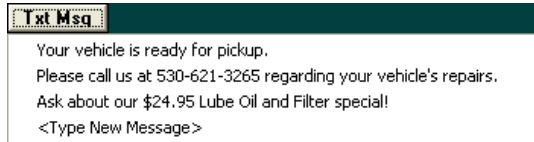


Director a brand new look and feel for Version 7. The menu buttons no longer have titles below them. Instead, you can view a tool tip for any button by hovering your mouse pointer over it. We've also enhanced

the look and feel when Shop Director is maximized on wide screen monitors.

2. Integrated Text Messaging – (Pro/Premium Editions, GS

w/Pak) We've added a new and easy way to communicate to your customers via text messaging. When you

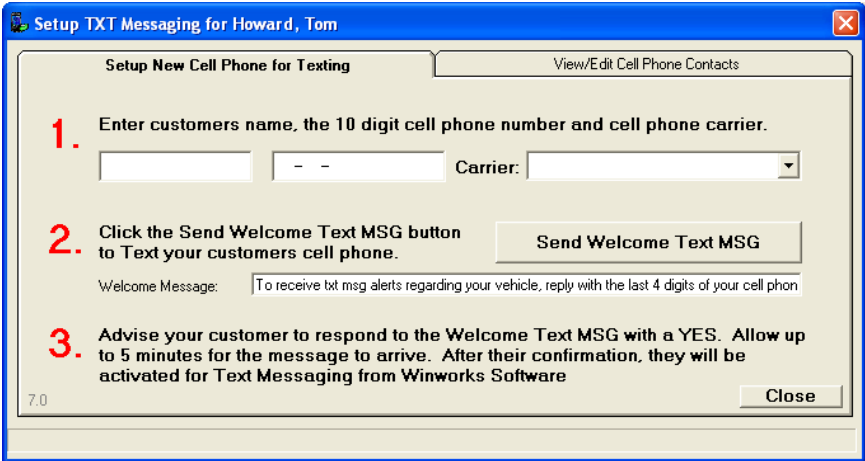


send a text message, you are sending a short message directly to your customer's cell phone. Responses from them are sent to your email address. You can send text messages directly from the Lookup window, the Scheduler's list view and the Marketing Machine. When you click the Txt Msg button in the Lookup Window or Scheduler List View, you will see a menu of saved messages. You can add or edit this list from the Standard Txt Msgs listing (select from the Lists menu). The Scheduler List View adds an 'Appointment Reminder' message that automatically inserts appointment data into the message for you. If text messaging has not been setup for a customer, you can set it up on the fly before sending your first message.

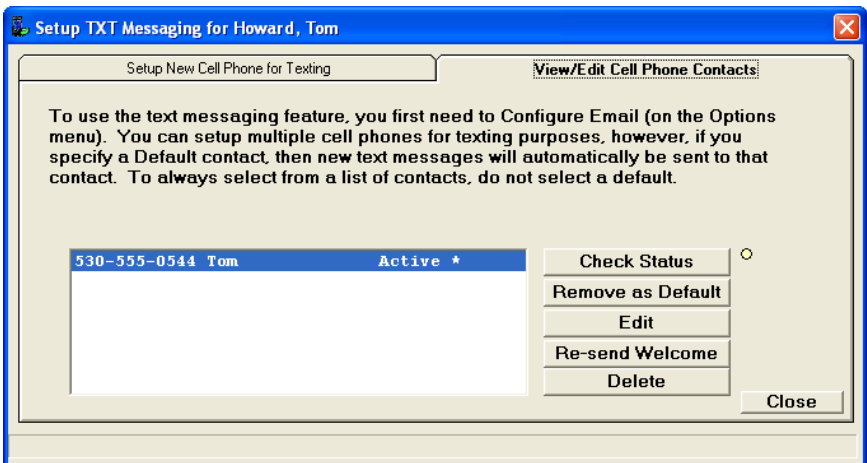
Setting up Customers for Text Messaging

To use the Text Messaging feature, you first need to have the Email system configured. Next, locate a customer via the Customer window and click the Setup TXT Messaging button. On the setup screen, enter the customer's first name, their 10 digit cell phone number and select their cell phone carrier. To comply with carrier requirements, your customer must 'Opt-In' to receive

text messages from your shop. To accomplish that, click on the 'Send Welcome Text MSG' button. A special text message will be

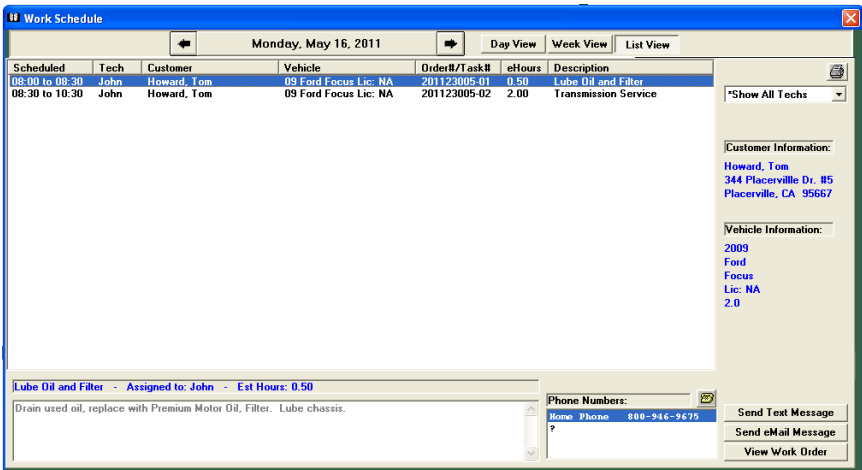


sent to their phone asking them to respond with the last four digits of their phone number to enable messaging from you. The Winworks Server handles this process for you as long as you maintain current technical support. The Winworks Server will send a message to your system when the customers text messaging has been activated via the Winworks Mail Client program. You can view the cell phones setup for your customer and their status on the View/Edit Cell Phone Contacts tab.



3. PDF Integration – There is a new View/Create PDF option for the Accounting Reports and Work Order printouts. This gives you a convenient way to preview a work order whether you've selected a standard or custom print format with options to save it to a PDF file or attach it to an email. Now the work orders customers receive via email will look the same as the printed versions. Shop Director will also insert their email address when you email them a work order. To view PDFs, you will need to download Adobe's Acrobat Reader from the Adobe website.

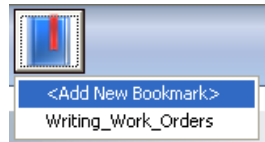
4. Scheduler List View – You can now view the days scheduled jobs and appointments in a convenient list format. The list will show the time period, assigned technician, customer, vehicle, work order number and job description. When you click on a job, you can view the jobs detailed description (1024 resolution only) and customer and vehicle contact information. You can also send the customer a text message, email or view the work order itself or edit the appointment from the List View. You can click on the column headers to change the sorting of the list. You can also limit the list to a particular technician and use the Printer icon to print the selected technician's jobs for the day. When viewing the Day View, double-click a scheduled appointment or task to view that item in the scheduler's List View.



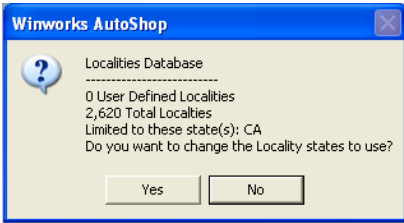
5. New Help System - We have completely re-written the Help System and provided you a new powerful tool to learn about all the time saving features within your MOTOR Shop Director system. Often there are features you're unaware of that can save



you time and improve the way your shop is managed. Now you can search the updated help system easily, create bookmarks for sections you want to refer to later and learn about features at your own pace. If while you're browsing the new Help system, you find a section you would like to bookmark, simply click the Bookmark button, click Add New Bookmark and it will be saved for you. To ensure fast networking, the new Winworks Help System is installed locally on each computer and saved bookmarks are only saved for the computer they were created on. You can also configure the top tool bar to include the Help button to more easily access the help system.

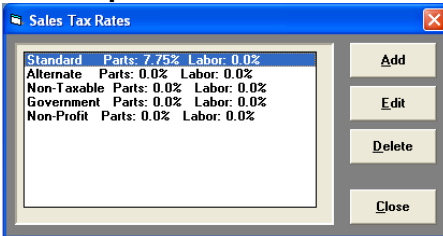


6. New Localities System – We now include a database of over 42,000 localities which are city/state/zip code combinations. By default, the list is limited to your home state. You can add additional status or use the entire US database. You can also customize the database by adding your own localities. From the Lists menu, choose Localities. To view or change the State selection

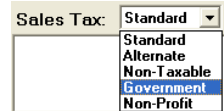


click the Database Information button. If you prefer to use the previous localities system, select the Data/Techlink Options tab on the Preferences window and select the 'Use Legacy Localities system' option.

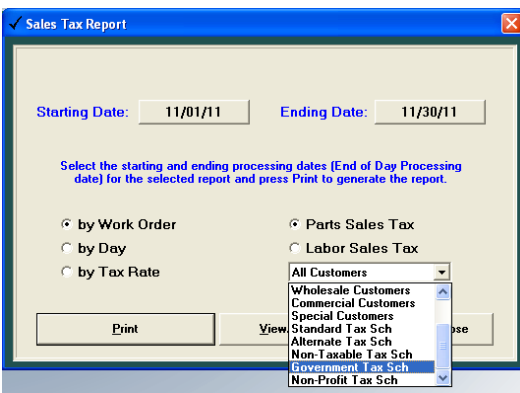
7. Multiple Sales Tax Rates - We've expanded the number of



special Sales Tax Rates you can setup. Now, you can add up to 35 sales tax rates. Select Sales Tax Rates from the Lists menu. As before, customers can be



setup on any sales tax rate. We have also modified the Sales Tax Report so that you can



limit the report to only those customers setup on a particular sales tax rate. For example, if you add a special Government sales tax rate, then you can print the Sales Tax Report for only those 'Government' customers. These combinations of

features should allow you to get more precise sales tax information for your tax return.

8. More Import Buttons on the Task Window – You can now have up to nine import buttons on the task window (7 on the 800



resolution). This was necessary as we add more and more importing options to the MOTOR Shop Director system such as importing tasks from closed work orders as discussed in item 11 below.

9. Advanced Lookup Search – The Lookup window now gives you a powerful way to locate a closed work order, counter sale or an estimate. You can search your database based on customer

Search: Estimates **Closed Work Orders** Closed Counter Sales

Types of Customers: Retail Wholesale Commercial Special

Within these dates: and

Dollar amounts between: and

WO numbers between: and

With this Service Advisor:

With this key word/phrase in the Reference:

With this key word/phrase in the Task Name:

With this Technician assigned to a Task:

With this key word/phrase in the Description:

With this key word/phrase in the Sublet Name:

Containing this Part Number:

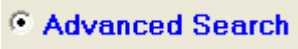
With this key word/phrase in a Part Description:

Apply these Vehicle Limits

Year Between: and **Make:**

Model:

type, within a date range or dollar amount. Other search options include: Service Advisor, the work order Reference field, key words in the task or part descriptions. You can limit the search to specific technicians or parts or vehicles. Once your search is complete, a list of all matching work orders or counter sale tickets will be shown. Using the Work Order Report feature (see item 17 below), you can get parts and labor totals for those results. To start an Advanced Search, from the Lookup window, click the Advanced Search option.



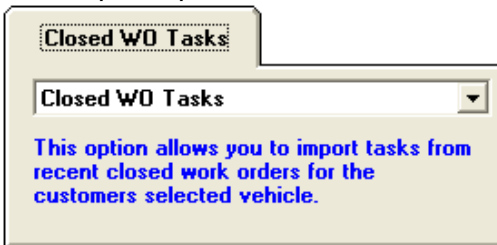
10. New Parts Catalog Interfaces – (Premium Edition Only)

We have added 3 parts catalog interfaces to our new Premium Edition. You can now locate and order aftermarket parts



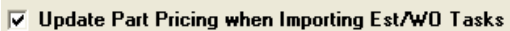
using Activant, IAP (Internet Auto Parts accessing multiple suppliers such as O’Reilly, Carquest, etc) and NAPA Online from within the MOTOR Shop Director system. Contact us for more information about upgrading to our Premium Edition.

11. Import Tasks from Closed Work Orders – We’ve added a new import option on the Task window.

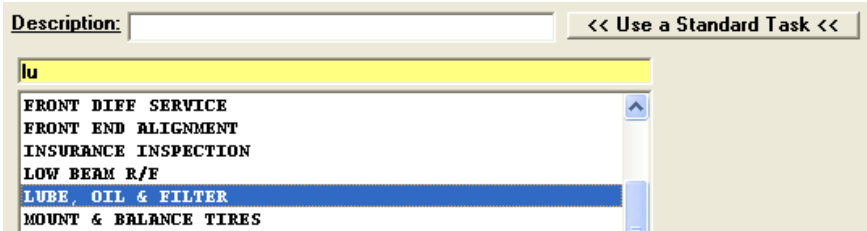


task from a recent closed work order for the current vehicle onto the new work order. This allows you to easily ‘repeat’ a previous job without re-creating the task. Add this ‘Import Option’ by selecting it as

one of your estimating systems in the Interface Settings window. By default, the part prices used will be those from the previous work order. However, you can choose to have Shop Director update the pricing to reflect the current price for parts imported. This option is at the bottom of the Interface Settings window.

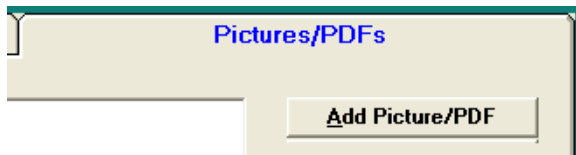


12. Standard Task Appointments – You can now create an appointment using one of your Standard Tasks. That way, when you convert the appointment to a work order, the standard task will already be setup. We’ve included our yellow ‘Power Search’ to help you quickly find the standard task you’re looking for. As always, drag an appointment from the schedule to the Write WO icon below the Make Appointment button to convert the appointment to a new work order.



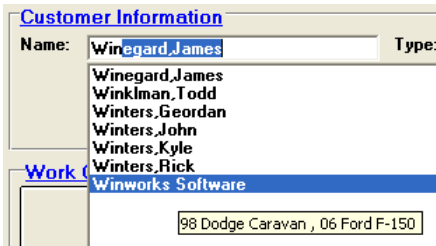
13. Open Window Indicator – Since MOTOR Shop Director allows you to have multiple work orders open at the same time along with other windows, we’ve made it easier for you to see a list of all open work orders by moving your mouse to the bottom information panel. There, you’ll now see a button for each open window when more than one window is open. Click on a button to open that window. The same list has been available in the Window menu. We do suggest, however, that you close work order windows by clicking OK since that is when your changes are saved.

14. Attach PDF Documents to a Vehicle Record – You can now attach a PDF document to the vehicles record by clicking the Pictures/PDFs tab on the vehicle window and clicking the Add Picture/PDF button. From the list, you can view or print any picture or PDF you’ve attached to a vehicle record.

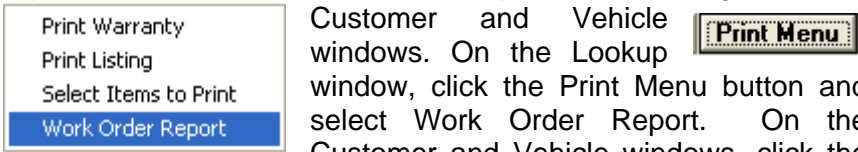


15. Track Marketing Source on each Work Order – In addition to tracking the marketing source of new customers on the customer window, you can now track the marketing source for each work order. We’ve also expanded the number of marketing sources so that you can track individual advertizing promotions among other sources. To view or add new marketing sources, select Marketing Sources from the Lists menu. To specify a work order marketing source, choose a pre-defined marketing source on the *Source* drop down list. The Management Overview report will provide results of your marketing efforts using the source you selected on work orders.

16. Work Order Customer Selection – When you search for a customer in the work order window, similar customers are shown in the drop down list. You can now point to a customer in the drop down list with your mouse to view a list of their vehicles before you select the customer.




17. Work Order Report – The new Work Order Report will print the list all the work orders displayed showing their date, work order number, customer, vehicle, labor, parts and total. This report is available from the Lookup window, along with the Customer and Vehicle windows. On the Lookup window, click the Print Menu button and select Work Order Report. On the Customer and Vehicle windows, click the Reports Menu button, and click Work Order Report.



18. Batch Work Order Printing – You can now print multiple work orders at a time from the Lookup window and the Customer and Vehicle windows. From the Lookup window, click the Print Menu button and choose Select Items to Print. On the Customer and Vehicle windows, click the Print button and choose Select Items to Print.

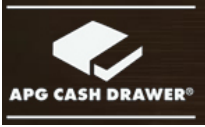
19. Markup Imported Labor Hours – You can now automatically increase imported labor hours when importing from labor estimating systems. This option at the bottom of the Interface Settings window allows you to set a percentage to increase those hours automatically. (i.e. enter 10 to increase labor hours by 10%)

20. Purchase Order System Enhancements –You can now press ENTER on the Purchase Order List window to open/view the selected PO. You can now receive a PO from the PO Listing window. In the Receive Parts window, the totals are now updated after receiving a PO. When editing a PO, when you click Add Part, it will only search for parts related to that vendor. If you selected your company as the supplier, previously clicking on that PO would show Unknown vendor for each part and allow reselection of a vendor. That has been corrected. When adding individual parts to a part order, the search engine was inadvertently turned off after the first part was added. This has been corrected. Previously when using the Inv List option on the Order Part window, you would only be viewing parts where the stock level was less than the minimum level. Now, this version will ask: "Do you want to only view parts whose Stock Level is LESS than the Minimum Level selected for the part?" and if you choose NO, you will view ALL parts for the selected vendor.

21. Lookup Window Enhancements – We've corrected issues related to the automatic refreshing of items in the Lookup window listing. We've added a new time period selection to enable viewing of all work order history. We've added a  Complete button so that you can easily mark a work order as complete in the Lookup window without opening the work order.

22. New Sublet Payable Report by Vendor – This new report shows your vendors sublet charges by vendor for a time period. The report shows the date, sublet task description, work order number, payable (cost) amount and the vendors name along with a total for each vendor. Select Sublet Payable Report from the Accounting menu/Accounting Reports menu.

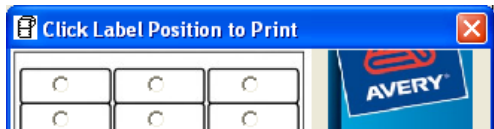
23. New USB Cash Drawer Integration – We've added integration with APG Series 4000 USB Cash Drawers. You can now add a mechanical cash drawer on any computer with a USB port. If you receive a cash payment the drawer will open automatically. Also, if you have full security rights, you can open the drawer by pressing Control-Z (or Open Cash Drawer from the Options menu). To enable the APG USB Cash Drawer, select it on the Other Settings tab of the Preferences window.



24. Show Standard Tasks within Groups – You can now organize your Standard Tasks into Groups. If the Inv Group option is selected, the list of Standard Tasks in both the Task window and the Standard Task window show the main Inventory Groups first. Double-click a group to see the Standard Tasks assigned to that group. This can aid in navigating to the standard task you're looking for. To turn this option on, from the Preferences window (select Preferences from the Options menu), choose the Work Order Settings tab and select the *Show Std Task Listing within Inv Groups* option.

25. New Customer Parts History Report – Similar to the Parts History report available from the Vehicle window, you can obtain a list of all parts sold to a customer by clicking the *Reports Menu* button on the customer window and selecting *Parts History Report*.

26. Easy Customer Address Label – You can print a single customer address from the Customer window directly onto any label position on an Avery 5160 label sheet. Locate a customer on the Customer window, click the Print Address Label button, select one of the 30 label positions for a partially used Avery 5160 label sheet and click Print. If the customer's address is not centered on the label, use the Adjustment button to change the left and top adjustments which are in inches.



27. New Inventory Purchases Report by Department option – You can now show the inventory purchases report for a selected department.

28. XCharge Credit Card Processing Enhancements – We've made many improvements to our integrated XCharge credit card processing system including the ability to accept ATM payments. In many cases, customers have chosen to XCharge as their credit card processing provider and lowered their rates and increased work order writing efficiency by processing directly within MOTOR Shop Director.

29. Search Phone Numbers – You can now locate a customer by searching for their phone number even if it isn't their main number.

Phones

On the Customer window, click the Phones button and enter the phone number to search.

30. More Info on Management Overview – Management Overview now includes totals for the number of services performed and the dollar amount.

31. New Employee Window Report – You can now view a report showing all the technicians assigned jobs, estimated hours, etc. by clicking the Report button on the Employee window.

32. CARFAX Integration – We've improved the reliability of our CARFAX uploader. If you're not currently integrating with CARFAX, consider the advantages: 1. Your customer gets 'credit' for maintaining their vehicle since their services will show on the CARFAX report enhancing their vehicles resale value., 2. The CARFAX report will show you as the Repair facility where they have serviced their car, giving you a chance to continue to maintain the vehicle after it changes hands, and 3. You can obtain valuable vehicle information using the CARFAX VIN Decoder.

33 You can view a list of all users in a multi user environment by clicking User List from the Users menu.

34. You can specify a default payment method on the Other Settings tab of the Preferences window (select Preferences from the Options menu)

35. We've replaced our previous Mitchell VME interface with two new Mitchell Interfaces: DVD and Online.

36. We've redesigned the timesheet window in TechLink so you can view a Active Tech list showing which technicians are working and what job they're logged into. To view this option on the timesheet window, select the 'Show Active Tech List' option in the Data/TechLink tab of the Preferences window.

37. We've made several improvements to the Marketing Machine. In addition to its new look and feel and the new Text Messaging option (see item 2 above), we now can export email address to data files. If you select multiple zip codes for location based marketing, your list is remembered the next time you run the Marketing Machine. Also when adding a location, you can enter a city name instead and all the zip codes for that city will be entered.

38. **Miscellaneous Changes:** You can now change the Part Condition Status Indicator (N-New, R-Rebuilt, S-Special Order, U-Used) when you edit a part on a work order. The Inventory List window now has a Receive button to receive parts on the fly from that window. You can now add an email address for a vendor. On the Standard Task window, you can limit the list to certain vehicles only. The Payments report now includes a subtotal of all payments before A/R Charges. The Labor reports have been enhanced. You can now print from the Receive Parts window. You can add a jpg picture to any inventory part. You can now select a printer when printing a Custom configured work order. Custom work orders can now be in color and include a logo. You can turn off the question "Add Another Part?" in the Add Part window on the Data/TechLink options tab of the Preferences window. The Timesheet window in TechLink now has a 'Show All Employees' option for those with Shop Foreman authority. The Wrenchead interface can now use part pricing from your internal database when importing parts onto a work order. We've added

an option to allow you to print the customer and vehicle boxes on each page of the standard work order using the /PC command line switch. The Order Parts window now includes a running total for both quantity and cost. New statement files have been added for California shops to comply with BAR requirements (See designat.smt and tirepres.smt). We have made many improvements to the Payment Allocation system. You can now require that all parts sold be added to the database on the Pricing/Other tab of the Inventory Settings window.

Program Optimization: If you are running MOTOR Shop Director on a network and would like to increase performance, please review the document Network Performance.doc in the Misc folder on the Ver. 7 CD. It contains the latest information we have regarding improving network performance including the use of **Microsoft Terminal Services** which we strongly recommend for three user and larger networks.

Tech Support Fee Increase: Beginning July 1, 2011 all technical support tier fees will increase by \$50 per year. This modest increase is the first increase in over 3 years. We review other software provider support fees and find that we are still among the lowest priced support services available.

In total we've made over 500 changes and more major improvements than any previous version. Thank you for your suggestions! We hope you'll enjoy the new features and enhancements.

The Winworks Team: Kevin, George, Brian, Julie, Jason, Edward, Kathee and Jenny.

Installation Instructions

1. Place the MOTOR Shop Director Version 7 CD in your CD drive.
2. Double-click the *My Computer* icon on your desktop, click the MOTOR Shop Director CD icon with the right mouse button and select Open/Explore. Double-click the Setup.exe icon.

This upgrade must be installed on all networked computers. Most do not require an Upgrade Key number. However, if you need the number, call us during our regular business hours.

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