ClipLizard®

Materials Manager® Setup Guide

Thank you for choosing Materials Manager. You are just steps away from being ready to go. Just take a look below for some things you may need to complete before getting started.

Step 1: Choose

Materials Manager® is available in two editions:
Lite & Pro

We recommend speaking with our Sales team before ultimately making your decision, but the highlights of each edition are shown below.

Materials Manager® Lite is focused primarily on invoicing and tracking of materials. Purchase orders can be created and printed to easily re-order your depleted products.

Its reporting features can help you get a better grasp on what products are being used on jobs, and which technicians are using the products that you are billing.

Materials Manager® Pro takes this a step further by managing your inventory as well.

It allows you to set re-order points on products and generates purchase orders for those items at the click of a button.

Materials Manager® Pro also had advanced reporting features to help you make the most of the money on your shelves.

Step 2: Download

Once you've decided which edition of **Materials Manager®** you wish to use, download the appropriate version from our website:
www.cliplizardsystems.com/downloads

If you are using an operating system **newer** than Windows XP, then you will need to disable User Account Control. Instructions for this can be found here:
http://windows.microsoft.com/en-us/windows-vista/turn-user-account-control-on-or-off

Step 3: Install

Once your download is complete, execute the installer and install the program accepting all defaults. You will be prompted for a restart when the install is complete.

Two shortcuts will be placed on your computer's desktop, **Materials Manager®** and Quick Invoice.

The **Materials Manager®** will start the program to its main screen.

Quick Invoice will start the program and immediately open a new Repair Order window.

Step 4: First Start

When you first open **Materials Manager®** you will be prompted to accept the EULA. Assuming you will do so, click in the box next to
"I Agree to the End User License Agreement"
and click "Continue."

You will be taken to the **Materials Manager®** main screen where you will see a collection of buttons for:

Quick Invoice
Repair Orders
Purchase Orders
Product Maintenance
Reports
Exit

Materials Manager® will not have any pre-loaded products upon install. Contact your sales representative for information regarding adding products to your system.

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Step 5: Registration

Materials Manager® requires an annually renewed registration.

To obtain a registration for **Materials Manager®**, a PO will need to be sent to ClipLizard with the following information for the shop location. The PO used to purchase this system is needed for proper billing.

****Information provided is what will be printed on invoices****

Company Name:
Address:
City:
State:
Zip Code:
Phone:
Fax:
Email:

Step 6: Technicians

Setup technicians by clicking on the ***Lists*** menu and clicking on Technicians. You will see that we've already setup one technician to get you started.

Creating multiple technicians ensures more accurate usage and profitability reporting, but you can operate **Materials Manager®** with a single technician.

To create a new technician login, click ***New***. Enter a number to represent the new tech then enter either a name or description for this new tech ID. When finished, click ***Save***. When you are finished adding technicians, click ***Exit***.

Step 7: Scan Sheets

There are a few scanning sheets that can be printed to make working with **Materials Manager®** even easier.

Technician Barcodes

Barcode Quantity Scan Sheet

Location Scan Sheet

All of these valuable resources can be found in the ***Reports*** section. We suggest printing these sheets and placing them near your **Materials Manager®** workstation for most effective use.

Step 8: Repair Orders

To create a new Repair Order (RO) click on ***Quick Invoice*** or ***Repair Orders***.
For this example, click on ***Repair Orders***, then click on ***New***.

Your cursor is already in the ***Repair Order ID*** field, so enter a RO# and press enter or tab to advance to the ***Product/Location Barcode*** field. Using your barcode scanner, scan an item from your parts bin or a usage location and it will be populated in the ***Products*** window below.
Scanning the same item again will add to the quantity of the existing item in the ***Products*** window.
When you are finished adding products click ***Save.***

Clicking ***Print*** will print the invoice to the systems default printer and close the RO.

Once an RO has been printed, you are no longer able to add items to it. An additional RO with the same RO# may be created as an additional supplement with the new products.