



## Matthews PaintManager® Software Guide

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# Section 1: Hardware

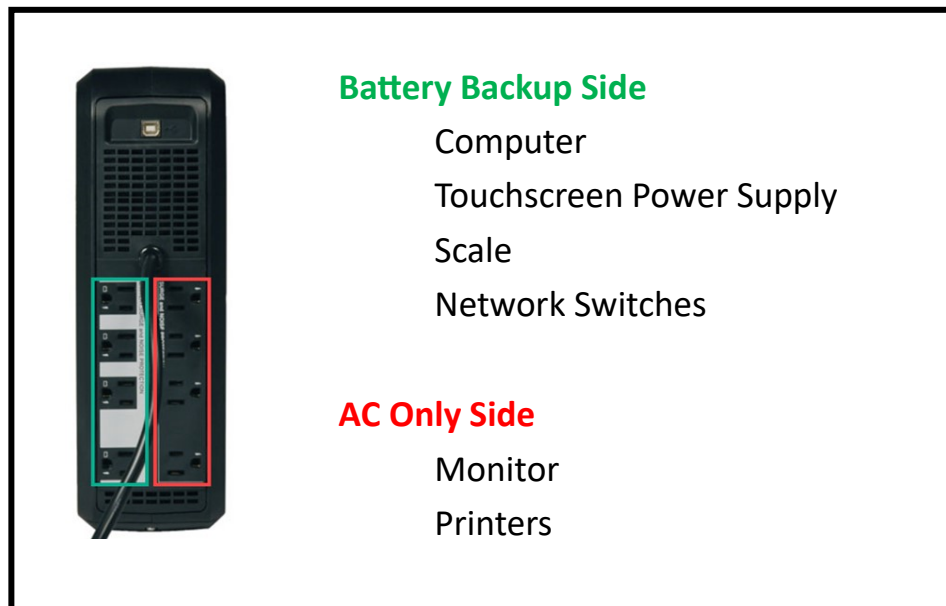
## Software Requirements for Matthews PaintManager® Software:

- Windows® 7 Professional Operating System or higher
- Internet Explorer Version 9 or higher
- Windows Updates Enabled and Up-To-Date



## Provide Safe Power with a Battery Backup (UPS)

- A UPS can save valuable equipment. If it quits working early in the two to three year life span it is probably because it did its job and handled a significant power event. Please replace it or look for potential environmental power conditions that may need to be addressed.
- Plugging your devices into the proper outlet is important. Please see the diagram below:



## Scales and Advanced Functionality

The Mettler BBA242x scales bring a new level of comfort and functionality into the shop.

### Full graphic display

The backlit LCD display with graphic capability allows full text and multi-language communication and guides you through your paint mixes with ease.

### Safe to use

The BBA242 meets all pertinent international hazardous area standards to ensure your safety.

### Unlimited connectivity

With RS232, USB and WLAN connection, the BBA242x scales integrate into any IT environment.

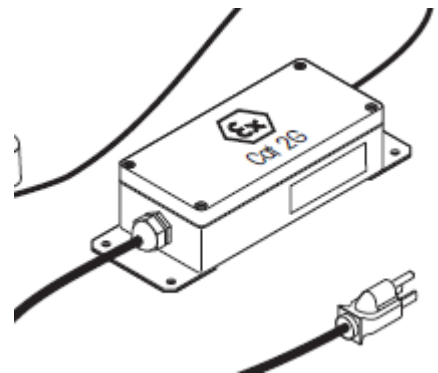
## The Mettler BBA242x Scale:

An easy interface allows you to download up to 20 recipes from a PC. The graphic display of the BBA242x form guides you through the mixing process and stores the mixing protocol inside the scale. Automated correction modes can be accessed in case you add too much of a component. The BBA242x paint offers all the features of the BBA242x form except the formula mode, making it a perfect solution for PC based mixing control.



## Scale Barriers:

Non-compliant scale barriers must be used outside the mixing room and cables can be passed through the mixing room wall using the additional port on the conduit wall plate. Compliant barriers can be used inside the mixing room eliminating the need to run the data cable from outside the mixing room.



## Part Number Summary for Matthews PaintManager® Hardware:

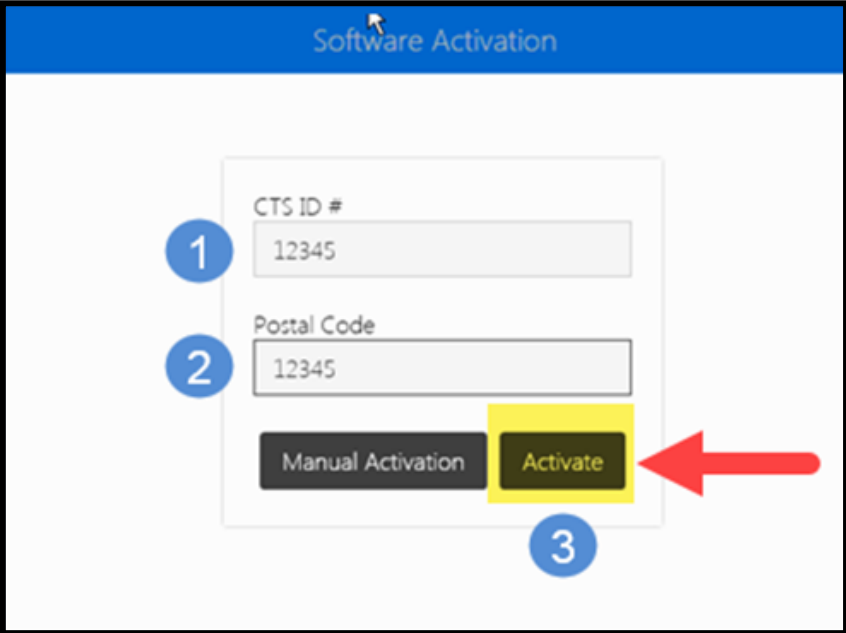
METTLER Toledo Item Number	Description	PART NUMBER
<b>Stand Alone Complete Scale</b>		
30026055	BBA242x Complete scale with EX1P Barrier	PPG838/EA
<b>All-in-one Arrow Computer in the Mix Room</b>		
30104576	BBA242x Scale Base-Only with EX1P Barrier and USB to RS232 Cable	PPG839B/EA
30566154	BBA242x Complete scale with EX1P Barrier and USB to RS232 Cable	PPG840D/EA
<b>Dell Computer outside the Mix Room</b>		
30548968	BBA242x Scale Base-Only with APS242x USB Barrier	PPG841B/EA
30404874	BBA242x Complete Scale with APS242x USB Barrier	PPG842D/EA
<b>Division 1 Solution</b>		
72235793	BBA242x Scale Base-Only without Power Barrier	PPG843B/EA
30124267	ADI856 Div1 touchscreen (with barrier & cables)	PPG832BDT/EA
30026057	BBA242x Complete scale without Power Barrier	PPG844D/EA
<b>5 - Gallon Solution</b>		
30566498	Combi Bench Scale ICS426xd-AB30 w/APS768x Barrier	PPG848G/EA
<b>Other Accessories / Components</b>		
METTLER Toledo Item	Description	PART NUMBER
72262434	Scale Base Protective Pan Cover (box of 5)	PPG845/PK
71153871	Scale Display Protective Head Cover (box of 5)	PPG846/PK
72262555	Complete Scale Stand (Column & Display only - no base)	PPG837/EA
30431241	USB Power and Communication Barrier Box FM Div 1	PPG847/EA
64088427	CABLE,USB TO RS232 CONVERTER,FTDI	PPG836/EA



# Section 2: Software Activation

## Web Activation:

With an internet connection all you need is the customer's CTS number and zip code to Activate.



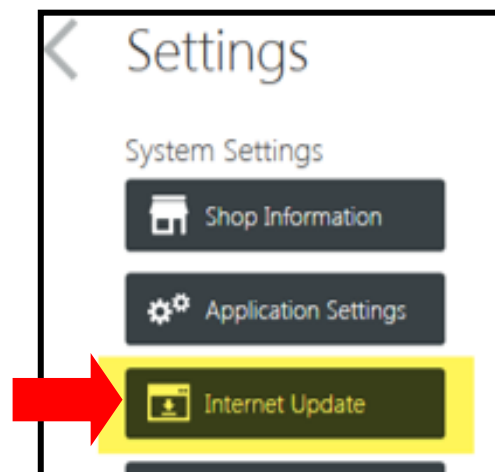
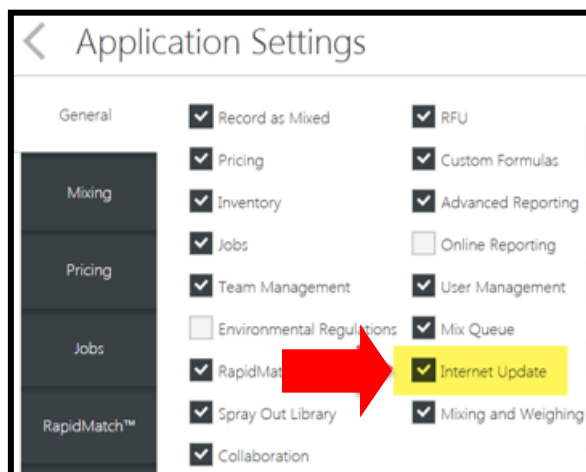
## Section 3: Networking Basics

### Internet Update General Information:

- Internet Update now resides inside the *Matthews PaintManager* software.
- Updates occur nightly with incremental formula data updates and program updates only as needed.
- Users will receive 5 one minute warnings before the program shuts down for an update.
  - Network clients will receive a command from the server to shut down as well.
  - Users will need to finish their work or save their progress.
  - Usually set to run at night or weekends to prevent any work disruption.
  - Network clients do not download updates individually because they receive updates from the server.
  - Network environments only require the server to download updates which are applied to clients.
  - When the *Matthews PaintManager* software is started on a client, it will check for updates and install them if they are available.
  - Users will see a message stating an update is in progress.
- 

### Internet Update - Enabling:

- Internet Update must be first enabled in the Settings Application Settings screen on the General Tab.
- Once enabled, It will display on the Settings Screen.



## Networking Basics:

There is a separate Installation Guide that details out the steps for installing and networking *Matthews PaintManager* Software.

### Server Installations:

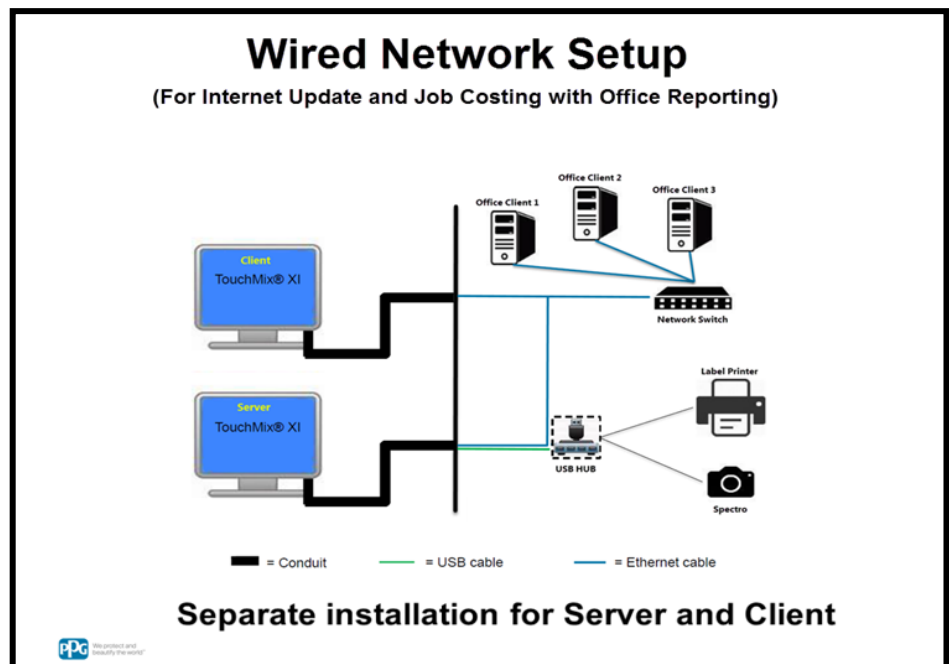
- The device designated as the server will require a complete installation which installs the server components along with the program.
- The Server application will receive the Internet Update and make it available to network clients.
- This installation will require an Activation when installed.

### Client Installations:

- Designated network clients require a custom installation to deselect any server components.
- Client installs do not require activation as they cannot operate without a connection to a server with an activation.
- Clients do not download Internet Updates because the Server passes updates to the Client.
- Network drive mapping or path information is not required. The client will automatically search the network for a valid *Matthews PaintManager* Server installation and request a connection.

## Wired Networks:

- Internet Update.
- Networking for job costing and reporting.
- Paint Shop Interface.

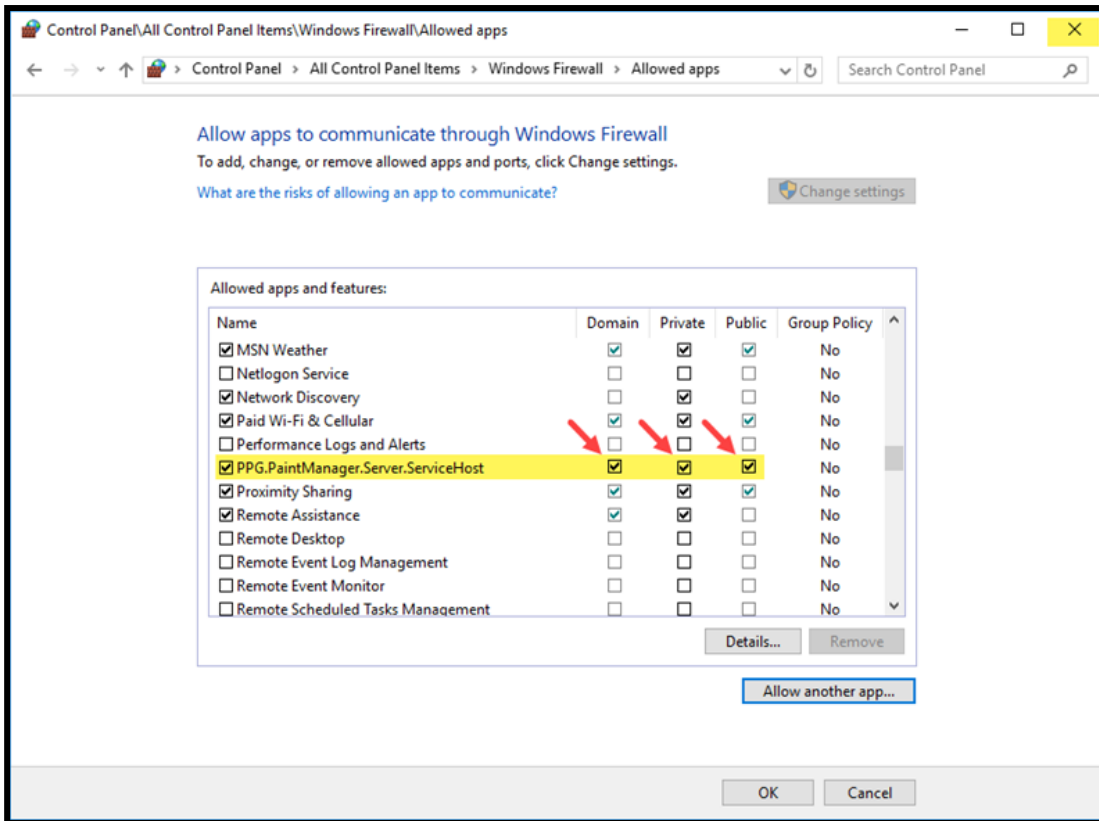


## Wireless Networks:

The Help Desk and CSSS Team will not provide support for wireless networks. The customer will need to provide their own IT support for installing and maintaining these networks.

## Server Firewall Configuration for Client Connectivity:

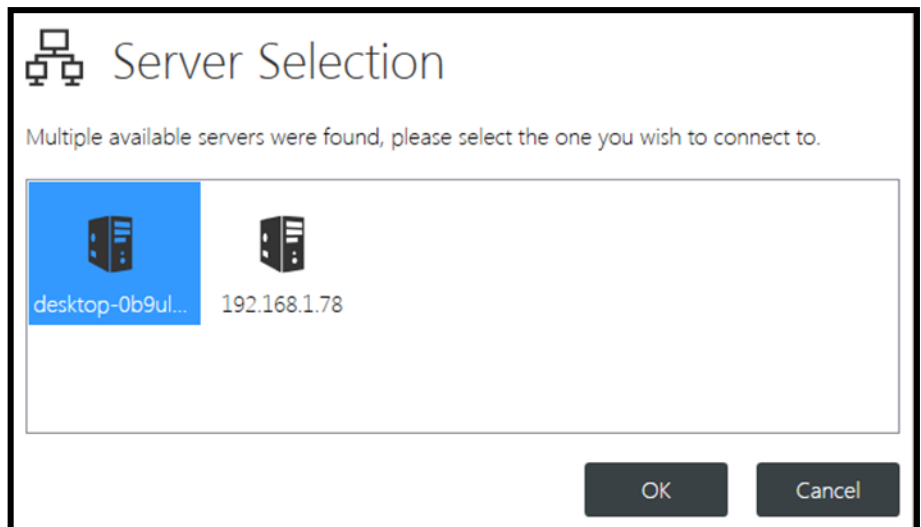
The Windows firewall must be configured to allow client connections. Detailed instructions are available in the Installation Guide for this step.



## Client Connectivity:

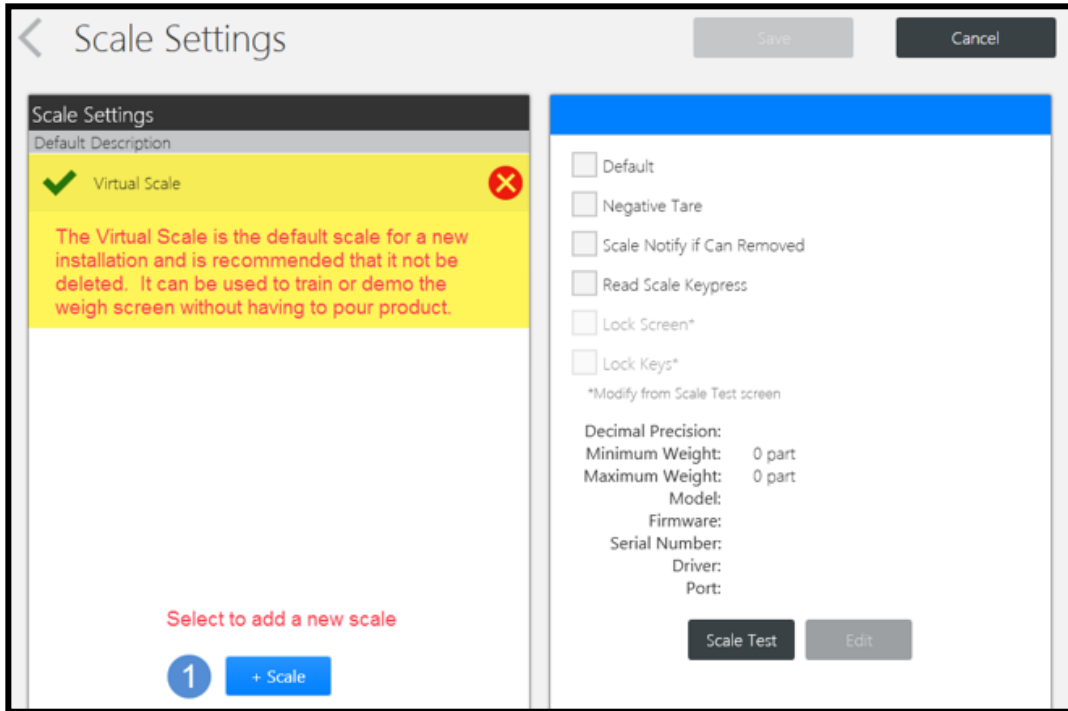
Once the client installation is complete and the program is started for the first time, you will be provided with connection options based on the server computer name or the server IP address.

- The Computer name connection is the recommended option for most cases.
- The IP address connection is only recommended for servers with a static IP address.



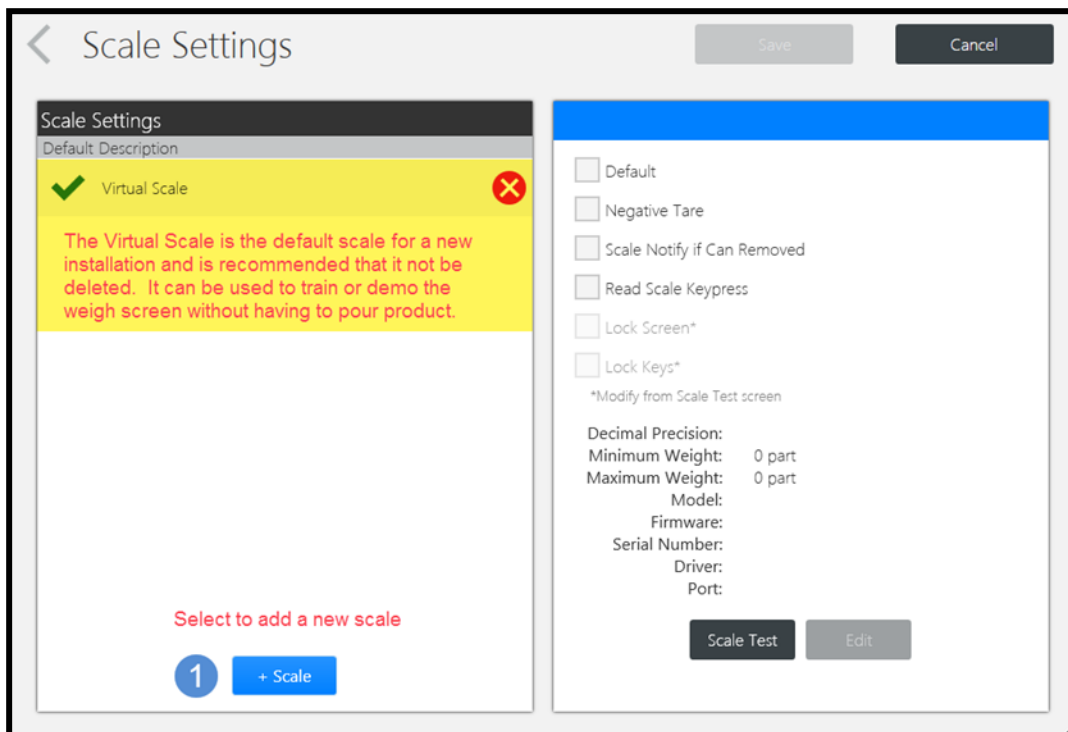
## Section 4: Advanced Scale Settings

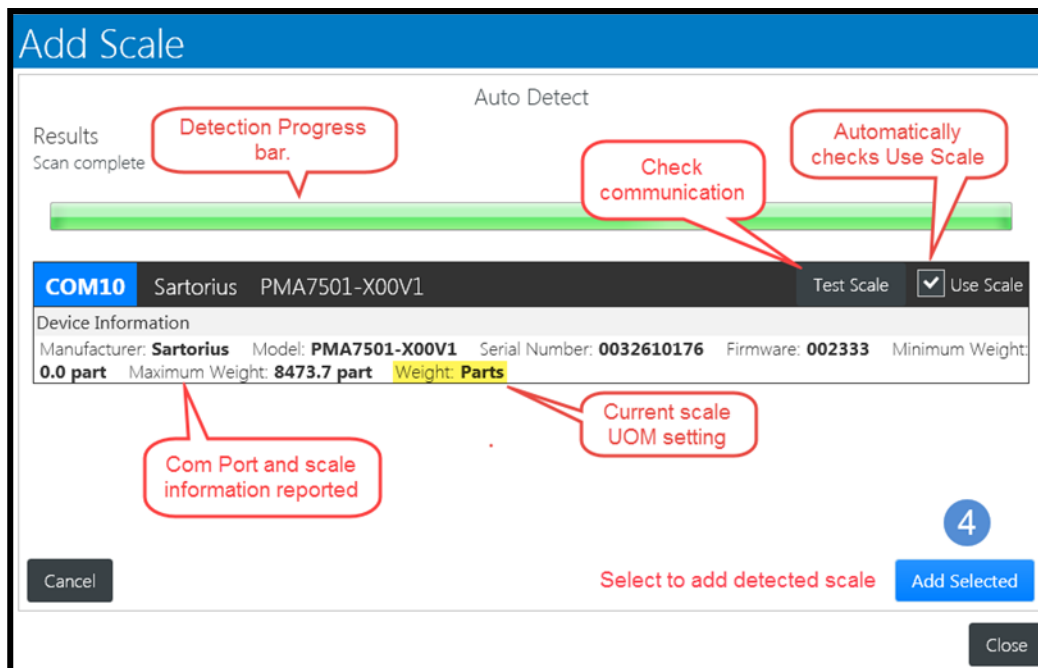
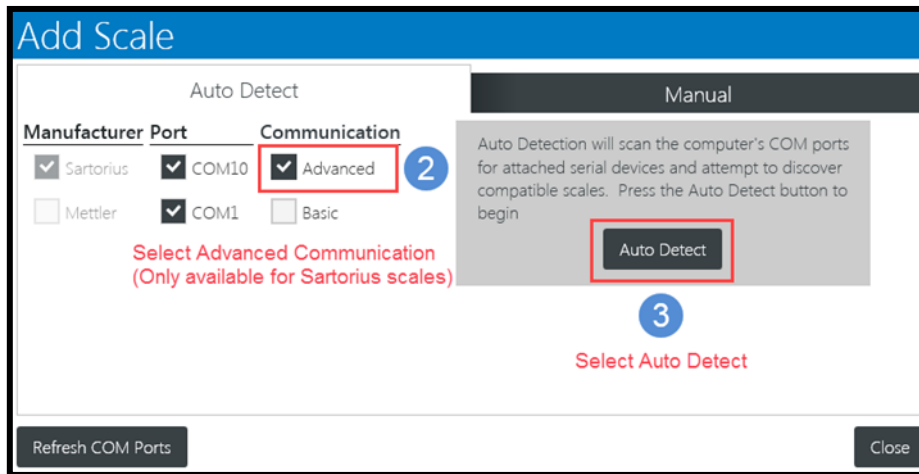
### Eligible Scales:



### Add a Scale Using Auto Detect:

From the Dashboard select Settings then Scale Settings.



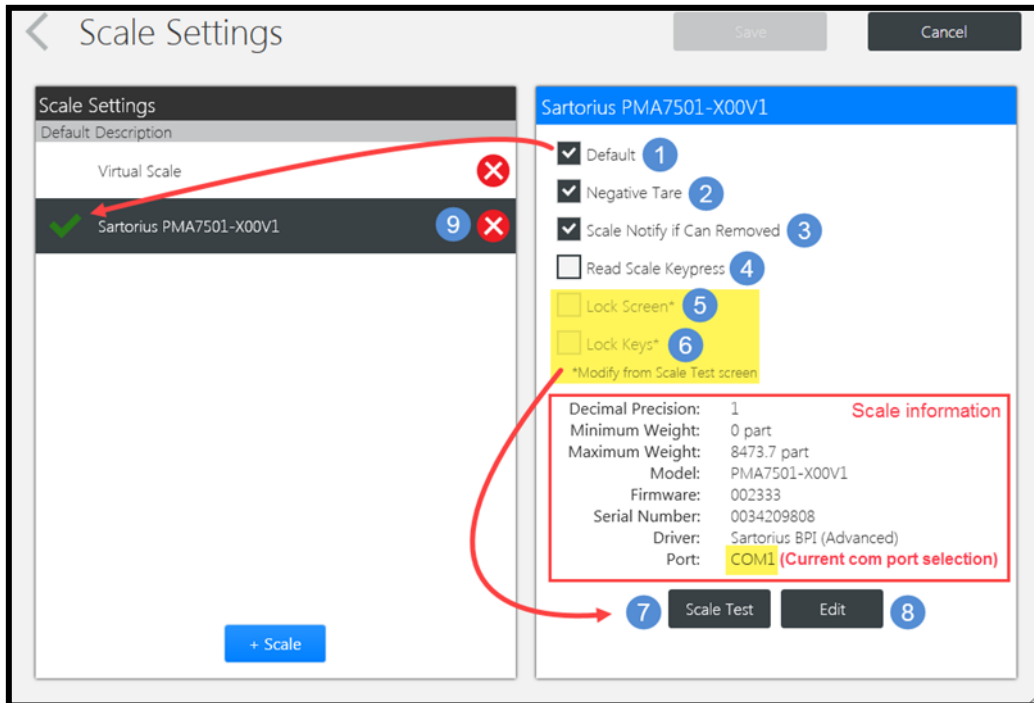


**Note: A scale previously installed with basic drivers may have to be removed and re-added with ad-  
vanced drivers after a computer reboot.**

### Adding a Scale Manually:

If you cannot connect to a scale using the auto detect method it is recommended you contact the Help Desk.

## Configure Advanced Settings:



### 1. Default:

Sets the selected scale to be the default for weighing.

Scale selection can be changed prior to weighing.

### 2. Negative Tare: Scale measures from a negative starting value to zero in sync with the software display.

### 3. Scale Notify if Can Removed: Scale display flashes a warning when the container is removed from the scale before mixing steps are completed.

### 4. Read Scale Keypress: This feature is only usable in the Scale Test screen. (See step 7 below)

### 5. Lock Screen:

Blanks the scale display requiring the user to follow the readout on the touchscreen.

Recommended for job cost environments to encourage capturing all mixing on the scale.

This must be configured using the Scale Test button at the bottom of the screen.

### 6. Lock Keys:

**Use with Caution**, disables access to the scale setup menu.

Disables the "Enter", "C", and "Up/Down" keys used to change the scale configuration.

Power, Toggle, and Tare buttons are still active.

When this feature is enabled the scale is locked and the only way to unlock it is with a connection to a Matthews PaintManager® software installation.

This must be configured using the Scale Test button at the bottom of the screen.

### 7. Scale Test: Used to setup advanced functions and test scale features. When selected you may have to choose options to close the scale server software first to gain access to this screen.

8. **Edit:** Used to make manual changes to scale communication parameters.
- Required to change scale com port selection.
  - Recommend not altering other settings without guidance from the Help Desk.
  - Unit of measure settings on this screen do not change settings in the scale. The scale must be configured for UOM using the setup on the scale.
9. **Remove:** To remove an unused scale or to re-add a scale.

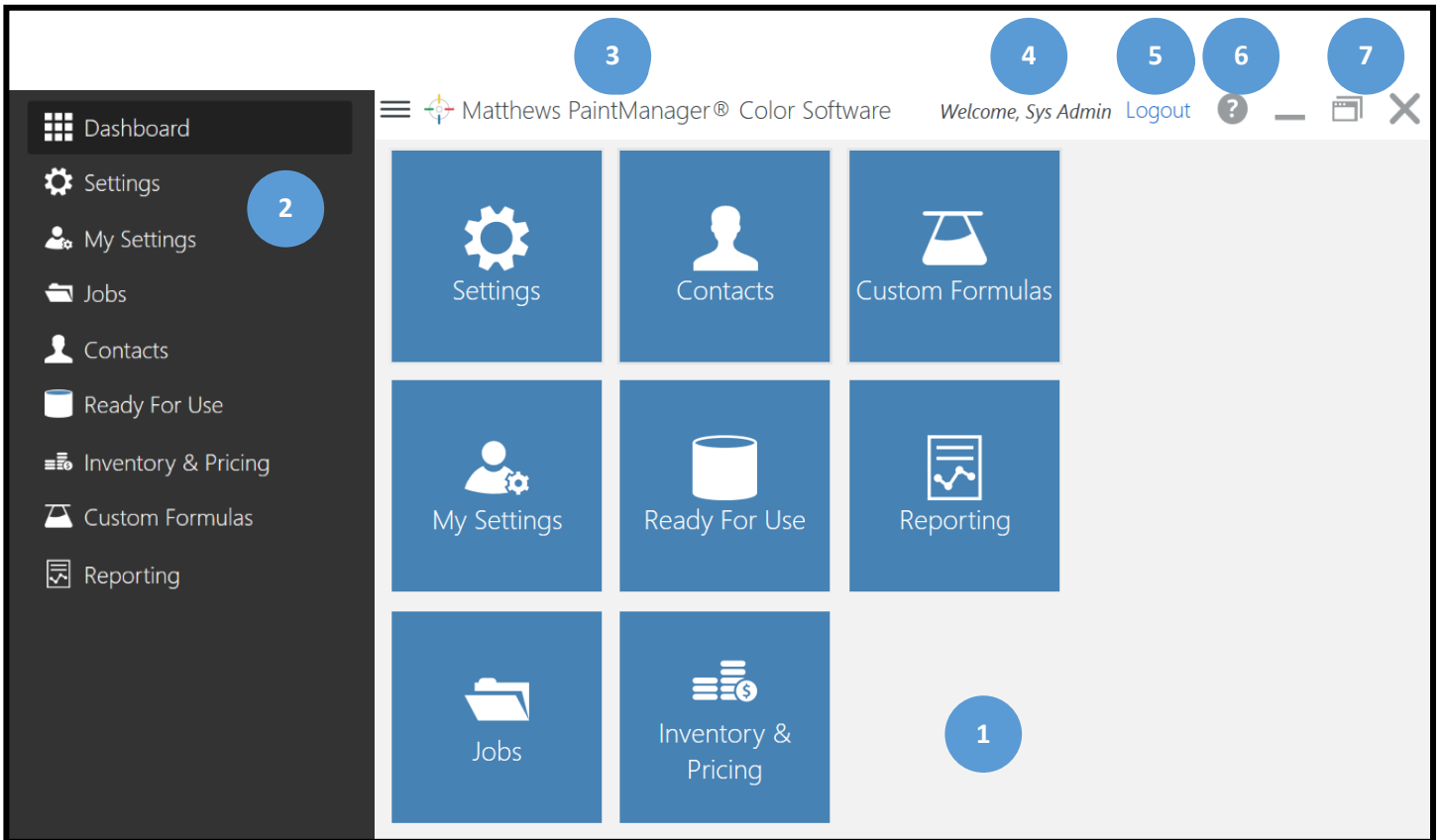
**Selected Scale:** Sartorius PMA7501-X00V1 Change com port here

<b>Driver</b>	Sartorius BPI (Advanced)	<b>Parity</b>	None
<b>Port</b>	COM1	<b>Stop Bit</b>	None
<b>Baud Rate</b>		<b>Handshake</b>	None
<b>Data Bit</b>		<b>Decimal Precision</b>	1
<b>Manufacturer</b>	Sartorius	<b>Serial Number</b>	0034209808
<b>Model</b>	PMA7501-X00V1	<b>Firmware</b>	002333
<b>Minimum Weight</b>	- 0.0001 +	Grams	Not used
<b>Maximum Weight</b>	- 7,513.8107 +	Grams	Not used
<b>Weight</b>	Parts		Not used

Cancel Save



# Section 5: Dashboard and Navigation



## The Dashboard:

### 1. Dashboard Tiles:

Single step navigation to enabled program components from the Dashboard

### 2. Main Menu:

Two-step navigation to enabled program components from anywhere in the program

### 3. Software Version

### 4. Logged in User

### 5. Logout

### 6. Question Mark

Legal Notices

About (i.e. program, customer, and computer Information)

### 7. Windows Controls



# Section 6: Settings

<p><b>System Settings</b></p> <ul style="list-style-type: none"> <li>1 Shop Information</li> <li>2 Application Settings</li> <li>3 Internet Update</li> <li>4 Backup and Restore</li> </ul> <p><b>Device Settings</b></p> <ul style="list-style-type: none"> <li>5 Display Settings</li> <li>6 Scale Settings</li> <li>7 Print Settings</li> </ul>	<p><b>Mixing Settings</b></p> <ul style="list-style-type: none"> <li>8 Units of Measure</li> <li>9 Paint Line Settings</li> <li>10 RFU Paint Line Settings</li> <li>11 Ready For Use Preferences</li> <li>12 Toner Management</li> </ul>	<p><b>User Settings</b></p> <ul style="list-style-type: none"> <li>13 User Management</li> </ul> <p><b>Report Settings</b></p> <ul style="list-style-type: none"> <li>14 Report Settings</li> </ul> <p><b>Regional Settings</b></p> <ul style="list-style-type: none"> <li>15 Language Settings</li> </ul>
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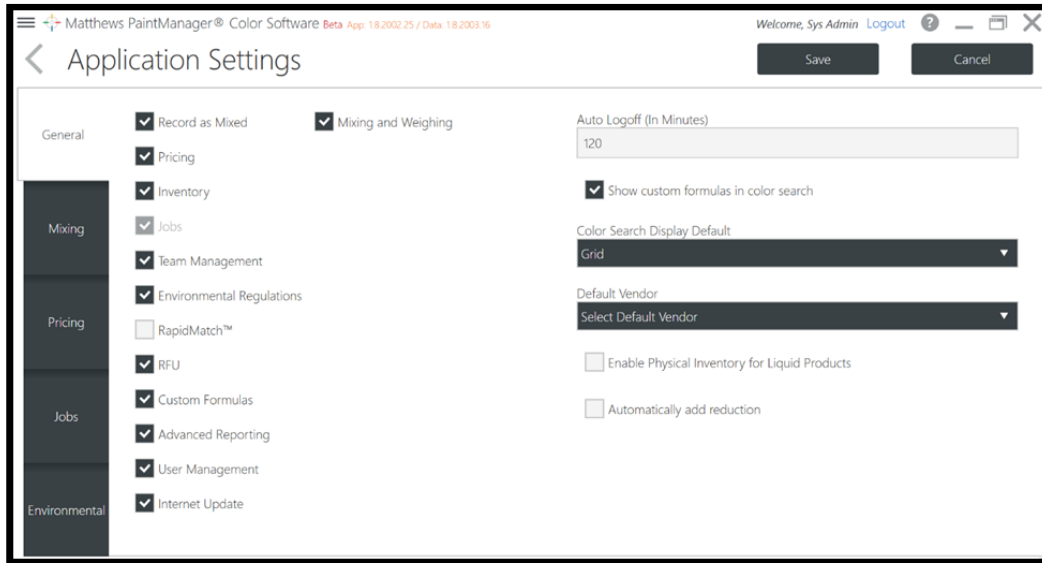
## 1 Shop Information:

### Shop Information

<input type="text" value="PPG Industries"/>	<input type="text" value="455811"/>
<input type="text" value="19699 Progress Drive"/>	
<input type="text" value="Address Line 2"/>	<input type="text" value="Address Line 3"/>
<input type="text" value="Postal Code: 44149"/>	<input type="text" value="City: Strongsville"/>
<input type="text" value="State/Province: OH"/>	
<input type="text" value="Telephone"/>	
<input type="text" value="Additional Info"/>	

Subscription type: Matthews PaintManager® Full Internet  
 Site Category: MPC  
 Price List: MPC  
 Activation Expiration: 2/27/2021

## Application Settings Main Screen:



### Record as Mixed:

Places a “Record as Mixed” button on the Mix Session Tab to record mixes to a job without having to mix them across the scale.

### Pricing:

Displays the “Inventory & Pricing” Tile on the Dashboard

Provides access to configure margins, discounts, and custom pricing

Shows pricing information for mixes on the “Mix Summary” and “Formula Details” screens

Enables the Pricing tab inside a selected Job for view financials and printing an Invoice

Provides a Tab on this screen to select options for how pricing is viewed in the program

### Inventory:

Displays the “Inventory & Pricing” Tile on the Dashboard to allow the configuration of inventory selections, pack size, sundries, sundry kits, and access to ordering and receiving

### Jobs:

Display Job tab on this screen to configure preferences

Displays the “Jobs” Tile on the Dashboard

Enables the Job Management Screen for mixing on Jobs for financial measurement

### Team Management:

Provides a button on the “Settings” screen to allow access to setup and manage teams

### Environmental Regulations:

Displays a Tab on this screen for configuring VOC tracking

### RapidMatch®:

Displays the “RapidMatch®” Tile on the Dashboard

Provides access to the Readings List

Displays button on Settings screen to detect the spectrophotometer

### RFU:

Displays a Tile on the Dashboard to allow access to configure and access RFU combinations.

Provides access to the RFU favorites for Undercoats and Clearcoats on the “Formula and Mixing”

**Custom Formulas:**

Provides a Tile on the Dashboard to access this feature

Allows the creation of Custom Formulas on the “Formula Details” screen on the Tools Menu

**Advanced Reporting:**

Enables the “Report Settings” button on the “Settings” screen

**User Management:**

Enables the “User Management” button on the Settings screen

**Internet Update:**

Provides an “Internet Update” button on the Settings screen for configuration to allow scheduled updates

**Mixing and Weighing:**

Provides the “Scale Settings” button on the Settings screen to detect and configure scales

Provides a “Mix” button on the “Mix Session” screen to weigh product on a scale

**Auto Logoff:**

Minutes of non-use before the program requires a user to log back in (480 max – 8 hrs)

**Show custom formulas in color search:**

Shows custom formulas in color search results that were created with the code being searched

**Color Search Display Default:**

Select Grid or List view for Color Search, Custom Formulas, and Jobs

**Default Vendor:**

Used if you are creating orders

**Enable Physical Inventory for Liquid Products:**

Enables inventory weigh capability (See Section 17 topic, “Weighing Inventory for Accurate Stock Levels and Valuation”)

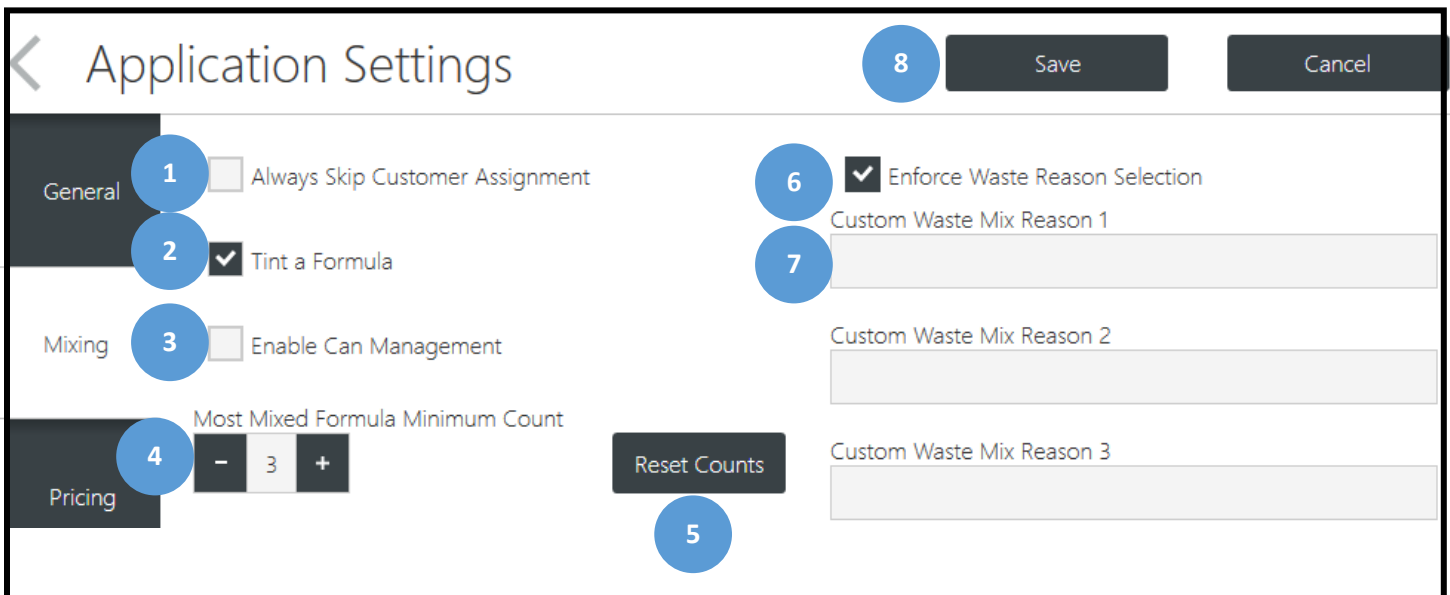
**Default Segment:**

Choose the segment you want to default to for color searches

**Automatically add reduction:**

If only one Ready for Use Preference exists for color mixes it will be automatically added to the color mix on the Formula Details Screen prior to mixing.

**Mixing Tab:**



### 1. Always Skip Customer Assignment:

- Allows a mix to be assigned to a customer when Jobs are not being used
- Only works if Jobs is not selected in Settings-Application Settings-General Tab
- When unchecked, selecting Mix or Record as Mixed the user is prompted to select a customer
- Selecting a customer is not required and can be skipped
- These mixes can be summarized by customer on the Customer Mix History report

### 2. Tint a Formula:

- Allows tinting of formulas

### 3. Enable Can Management:

- Provides ability to add can costs to jobs and have program suggest can size for mixes

### 4. Most Mixed Formula Minimum Count:

- Flags formulas during color lookup that have been mixed this many times
- Flagged mixes are moved to the front of the search results list

### 5. Reset Counts:

- Resets all mix counts back to zero

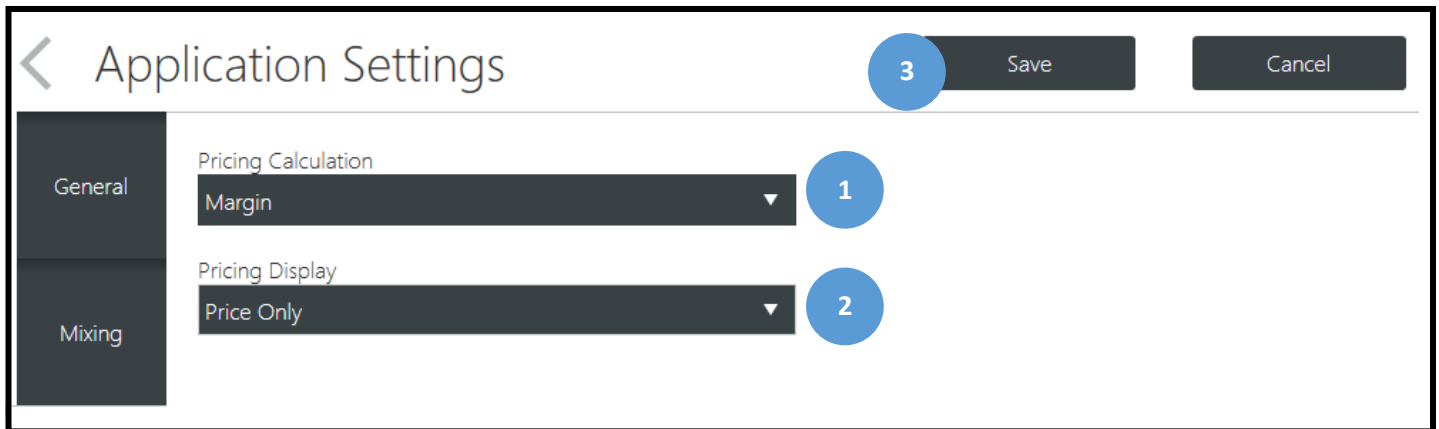
### 6. Enforce Waste Reason:

- When checked requires a Waste Reason to be selected when a mix is wasted

### 7. Custom Waste Reasons:

- Optional custom waste reasons can be added here in addition to program defaults

### 8. Save



## Pricing:

### 1. Pricing Calculation

- Select Margin or Markup (Margin is the recommended default)

### 2. Pricing Display

- Choose the way the program displays pricing (Both is recommended for job costing)

### 3. Save

## Jobs:

Application Settings

Save Cancel

General

- Require Jobs for Mixing
- Automatically Close Jobs

Mixing

Expected Cost per Hour

Number of Days Until Jobs Close

180

Extend at the End of the Month

Pricing

Non-Sprayable % of Total

0

Track Rework

Jobs

Non-Sprayable Line Item Description

Default Job Sort Order

Due Date Ascending

Custom Rework Reason 1

Custom Rework Reason 2

Custom Rework Reason 3

Environmental

### Require jobs for mixing:

- This is automatically selected and cannot be changed when Environmental Regulations is selected on the General Tab.
- When Environmental Regulation is not selected, this can be unchecked to make job selection optional when mixing that will place a “Skip” button on the job selection screen.

### Financials:

- This is automatically selected and cannot be changed when “Environmental Regulations” is selected on the General Tab.
- This selection will enable the Financial “(\$)” tab on the individual job screen.
- This must be selected to print an Invoice.

### Expected Cost per Hour:

- This value is used as the desired target in reporting to measure actual results to target.
- This value will be determined by market trends and current pricing.

### Non-Sprayable % of Job Total:

- This value will be used on the Job Financial tab to determine what percentage of the Job Total cost/price will be allocated for non-sprayables.

*Example - If the “Non-Sprayable % of Job Total” is 30% and the Job Total is \$100:*

*\$30 will be allocated to non-sprayables— \$70 to sprayables*

- Also determines what is printed on the invoice

### Non Sprayable Line Item Description:

- This is the description that will print on the invoice for the non-sprayable calculation

### Automatically Close Jobs:

- Closes jobs automatically to help the Job screen from growing too large to manage

### Number of Days Until Jobs Close:

The time period the jobs stays open from the date it was created before being closed.

This will vary depending on how long jobs generally stay in the shop.

Closed jobs will be available for viewing in the program even if they are closed.

Special permissions are needed by the user to be able to modify a closed job.

### Extend at the End of the Month:

Recommend this be selected for job costing and/or VOC reporting.

This will keep report data together by the month when it makes a difference.

If the shop is using the Paint Shop Interface, the vast majority of the jobs will be closed before the auto close time period is reached so this setting is not as critical.

### Track Rework:

Provides an option to flag/un-flag a layer/mix on a job as rework.

This button will be displayed on the job layer tab on the Tools menu for a given mix.

### Custom Rework Reasons:

Can be added here to display in addition to the defaults provided.

Save

## Environmental Regulations (VOC):

Application Settings

7 Save Cancel

1 Set Active Collision Rule

2 Set Active Industrial Rule

3 Permit Number

4  Enforce Booth Selection

5 Booth Maintenance

6 Rule Maintenance

Jobs

Environmental

1. Select the appropriate VOC Rule
2. Select the appropriate Active Industrial Rule
3. Enter your permit number
4. When checked, this requires booth selection prior to mixing.
5. Setup multiple booths / permit numbers
6. Change the product VOC Category (Use Caution)
7. Save

## My Settings:

This feature allows the user to set preference items that are applied when they login.

The screenshot shows the 'My Settings' page with the following elements and callouts:

- 1** User: A section for user information with two input fields. The first field contains 'Sys' and the second contains 'Admin'. A red callout states: **1. First and last name of user (username cannot be changed—See User Management)**
- 2** Password: A section for password with two input fields labeled 'Password' and 'Confirm Password'. A red callout states: **2. Set the user password (password can be changed)**
- 3** Language: A section with two dropdown menus. The first is labeled 'Language' and contains 'Use Shop Language'. The second is labeled 'Start Page' and contains 'Select Start Page'. A red callout states: **3. Select the Language and Region (The same language is represented differently depending on the region in which it is spoken)**
- 4** Color Search Display Default: A dropdown menu containing 'Grid'. A red callout states: **4. Select Grid or List display. This will be applied to the Color Search results, Custom Formulas screen, and Jobs screen.**
- 5** Start Page: A dropdown menu containing 'Select Start Page'. A red callout states: **5. Select a home page**
- 6** Save and Cancel buttons: Two buttons at the bottom of the page. A red callout states: **6. For changes to take effect, you must first save your changes, log out, and then log back in.**

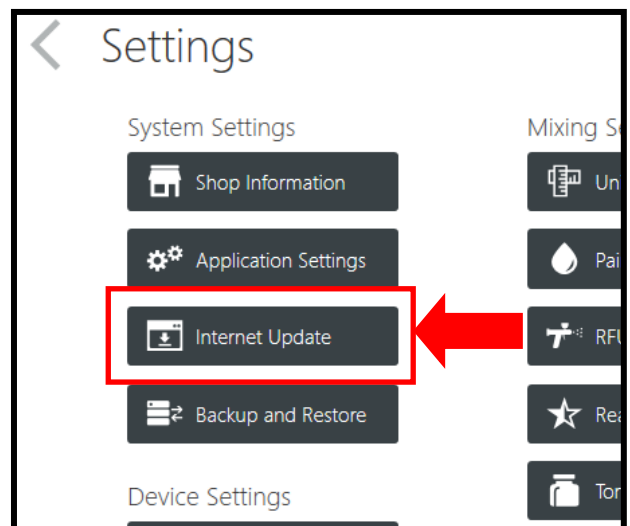
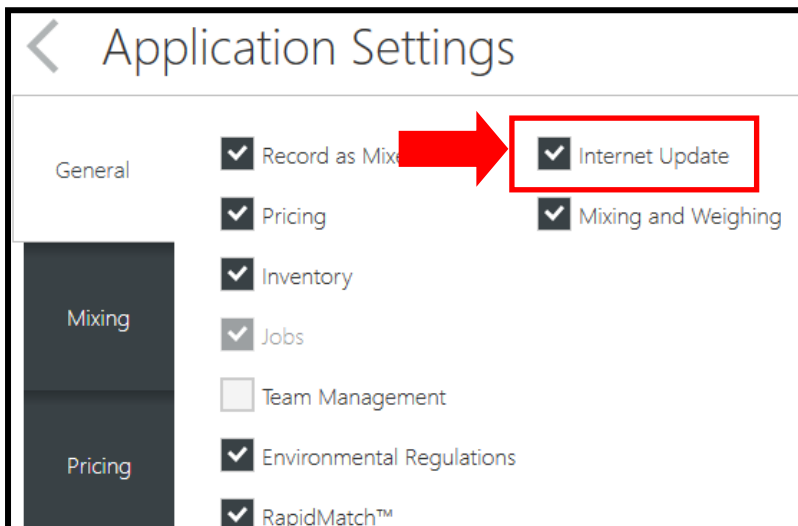


### 3 Internet Update General Information:

- Internet Update now resides inside the *Matthews PaintManager* software.
- Updates occur nightly with incremental formula data updates and program updates only as needed.
- Users will receive 5 one minute warnings before the program shuts down for an update.
  - ◆Network clients will receive a command from the server to shut down as well.
  - ◆Users will need to finish their work or save their progress.
  - ◆Usually set to run at night or weekends to prevent any work disruption.
  - ◆Network clients do not download updates individually because they receive updates from the server.
  - ◆Network environments only require the server to download updates which are applied to clients.
  - ◆When the *Matthews PaintManager* software is started on a client it will check for updates and install them if they are available.
  - ◆Users will see a message stating an update is in progress.

### Internet Update - Enabling:

- Internet Update must first be enabled in the Settings Application Settings screen on the General Tab.
- Once enabled it will display on the Settings Screen.



## Internet Update Configuration:

Internet Update

Enable automatic daily updates

DAILY DOWNLOAD TIME: 12:00 AM

DAILY INSTALLATION TIME: 1:00 AM

Download and Installation time must be at least one hour apart

Date/Time	Status

Update status information will populate here as steps are completed

Software Version: Current Application Version: 0.6.1702.4

Data Version: Current Data Version 0.6.1702.1

Refresh

### 1. Enable Automatic Daily Updates

### 2. Daily Download Time

- Recommended setting this outside business hours.

### 3. Daily Installation Time

- Must be at least one hour later than the daily download time.
- If your internet download speed is slow this should be increased.

### 4. Save

### 5. Update Now

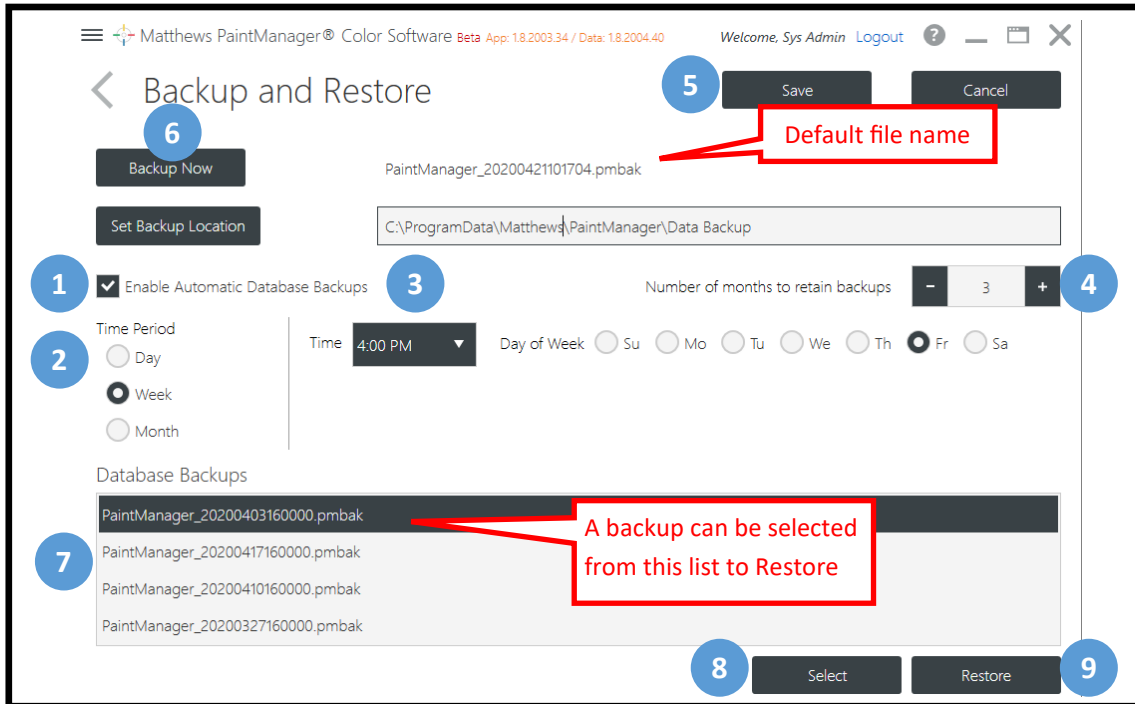
- Will download updates and install them now.

Caution: This will shut down the server as well as all network clients.

### 6. Refresh

- Refreshes the update status.
- Use to check for possible errors encountered by the update.

## 4 Backup and Restore:



### Backup:

1. **Enable Automatic Backup:** Check to enable
2. **Time Period:** Select desired time interval for automatic updates to be initiated
3. **Time:** Choose the desired time for the backup to take place. (Preferably outside normal business hours.)
4. **Months to Retain Backups:** Backups older than this selection will be deleted
5. **Save:** Save selected settings for them to take effect
6. **Backup Now:** Select to initiate an immediate backup

### Restore:

7. **Database Backups:** A list of backups that can be selected to restore  
 "C:\Programdata\Matthews\PaintManager\Data Backup\"
8. **Select:** Choose a backup that is not in the default backup folder, such as a flash drive
9. **Restore:** Once a backup is selected this will initiate the restore process

### Backup File Name Description:

PaintManager_20170213081208.pmbak					
	Year	Month & Day	Hour & Minute	Seconds	
PaintManager_	2017	0213	0812	08	.pmbak

## 5 Display Settings:

The screenshot shows the 'Display Settings' screen. At the top left is a back arrow and the title 'Display Settings'. At the top right are 'Save' and 'Cancel' buttons. A red box highlights the 'Save' button, with a blue circle containing the number '3' next to it. On the left side, there are two settings, each with a blue circle containing a number: '1' next to 'Start application maximized' and '2' next to 'Enable legacy touchscreen support'. To the right of these settings are two red text annotations: '1. The program will start in full screen.' and '2. Will allow for proper touch and on-screen keyboard functionality with Planar touchscreens.'

1  Start application maximized

2  Enable legacy touchscreen support

3 Save Cancel

1. The program will start in full screen.

2. Will allow for proper touch and on-screen keyboard functionality with Planar touchscreens.

## 6 Scale Settings:

The screenshot shows the 'Scale Settings' screen within the 'Matthews PaintManager' application. The title bar at the top includes the application name, version 'Beta App: 1.8.2003.34 / Data: 1.8.2003.37', and a 'Welcome, Sys Admin Logout' message. The screen is divided into two main sections. The left section, titled 'Scale Settings', has a dark header with a green checkmark and the text 'Virtual Scale', and a red 'X' icon in the top right corner. Below this is a large empty white area with a blue '+ Scale' button at the bottom. The right section, titled 'Virtual Scale', has a blue header and contains several settings: 'Default' (checked), 'Negative Tare' (unchecked), 'Scale Notify if Can Removed' (unchecked), 'Read Scale Keypress' (unchecked), 'Lock Screen\*' (unchecked), and 'Lock Keys\*' (unchecked). Below these are fields for 'Decimal Precision: 1', 'Minimum Weight: 0 g', 'Maximum Weight: 100000 g', 'Model: PPG Virtual Scale', 'Firmware: 1', 'Serial Number: 0123456789', 'Driver: Virtual Scale', and 'Port: VIRTUAL\_COM'. At the bottom right of this section are 'Scale Test' and 'Edit' buttons.

Matthews PaintManager® Color Software Beta App: 1.8.2003.34 / Data: 1.8.2003.37 Welcome, Sys Admin Logout

Scale Settings

Virtual Scale

Virtual Scale

Default

Negative Tare

Scale Notify if Can Removed

Read Scale Keypress

Lock Screen\*

Lock Keys\*

\*Modify from Scale Test screen

Decimal Precision: 1

Minimum Weight: 0 g

Maximum Weight: 100000 g

Model: PPG Virtual Scale

Firmware: 1

Serial Number: 0123456789

Driver: Virtual Scale

Port: VIRTUAL\_COM

+ Scale

Scale Test Edit

## 7 Print Settings:

The DYMO® label printer no longer needs to be configured in *Windows*. Label size, orientation, font and barcodes are all determined based on the Template selection in this setup screen.

### 1. Printer Selection:

Select the *Windows* printer for your label and Paper printer

### 2. Copies:

Choose the number of labels or paper copies to print by default

### 3. Show Print Dialog Box:

Recommended that this is **NOT** selected for most situations. When selected this will cause the *Windows* print dialog box to appear each time a document is printed. Not selecting this will prevent unnecessary steps in the printing process.

### 4. Show Print Preview:

Recommended that this option **BE** selected. This will allow for additional information to be placed on a printed label as well as previewing reports before printing.

### 5. Template selection (based on user preference):

30256 Landscape Full Formula is the label template preference for most users.

### 6. Save

## 8 Units of Measure:

Matthews PaintManager® Color Software Beta App: 1.8.2003.34 / Data: 1.8.2003.59 Welcome, Sys Admin Logout

### Units of Measure

Select to show formulas as either incremental or cumulative.

Incremental (1)

Density lbs/gal (2)

#### Final Target

Formula Target Unit Type Volume (3)

Default Unit U.S. Fluid Ounces (4)

Default Amount 1 (5)

#### Components

Component Unit Type Weight (6)

Default Unit Grams (7)

# of Decimal Places 1 (8)

Save Cancel (9)

### 1. Select *Incremental* or *Cumulative*:

*Incremental* is the recommended default which will provide a target amount for each specific component of a formula.

### 2. Density:

lbs/gal is the recommended default.

### Final Target

#### 3. Formula Target Unit Type:

Volume is the recommended default which will allow the user to select the quantity to mix based on units such as fluid ounces, pints, or quarts.

#### 4. Default Unit:

The unit selected here will become the default for mixing and can be changed before mixing. This will also be the Unit of Measure for creating new report templates.

**5. Default Amount:** This is the default quantity used for every product mix which can be changed before mixing.

### Components

#### 6. Component Unit Type:

Weight is the recommended default. This selection will allow the user to weigh the selected mix by weight such as parts or grams.

#### 7. Default Unit:

Typically this will be either Parts or Grams depending on user preference. Note that for accurate weighing of products this setting must match the UOM set for the scale.

#### 8. Decimal places:

1 is recommended

#### 9. Save

## 9 Paint Line Settings:

Select default Paint Line(s) and Paint Finish(s).

1. Check all applicable paint lines the shop will be using.

2. Select all finishes, or deselect certain finishes if necessary.

3. Select to view all paint lines if necessary.

4. Save Changes.

## 10 Ready for Use Preferences:

1. Master List—Shows all products available to select for RFU

2. Favorites List—Displays all products selected as favorites.

3. Search—Search Master List and Favorites List with specific product code or name.

4. Filter Options—Filter results by paint line or category.

PRODUCT GROUP	SUBCATEGORY	APPLICATION
274528SP	PRIMER	Gray Epoxy Primer 2.1 VOC
274530SP	PRIMER	White Epoxy Primer 2.1 VOC
274531SP	PRIMER	Black Epoxy Primer 2.1 VOC
274685SP	PRIMER	U-Prime White Urethane Primer 2.8 VOC
274685SP	PRIMER	U-Prime White Urethane Primer 3.5 VOC
274777SP	PRIMER	Tie Bond Adhesive (Zero VOC)

## Ready for Use Preferences (Continued):

1. Search for a product.

2. Select the desired RFU combination.

3. Select the star to highlight as a Favorite.

PRODUCT GROUP	SUBCATEGORY	APPLICATION
42228SP	CLEAR	MAP Satin Clear

★	42228SP 3	43270SP 1	63795P 1	MAP Satin Clear
VOC Category:				
★	42228SP 3	43270SP 1	63965P 1	MAP Satin Clear
VOC Category:				
★	42228SP 3	43270SP 1	452805P 1	MAP Satin Clear
VOC Category:				

Select the Favorites Tab to see that the Favorite is now available.

★	42228SP 3	43270SP 1	63965P 1	MAP Satin Clear
Shop Notes:				
VOC Category:				

## 11 Toner Management:

MANAGE LEVELS

All Paint Lines | All Categories | All Minimums | All Inventory | Product code search

Select All | Clear Selection | Not Used | Used | Save | Cancel

USED	CODE	DESCRIPTION	SKU	PACK SIZE	QTY	MIN	REORDER	ADD TO CART
✓	283320SP	SATIN VOC CATALYST	283320SP/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	283800SP	VOC MAP CATALYST	283800SP/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	43270SP	UNIVERSAL CATALYST	43270SP/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	43621SP	BRUSHING CATALYST	43270SP/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	43999SP	SLOW CATALYST	43270SP/01	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	6278SP	HIGH PERFORMANCE CATAL...	6278SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✓	74735SP	ACTIVATOR	74735SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✓	74766SP	PT ACTIVATOR	74766SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✓	74781SP	HBEF ACTIVATOR	74781SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✓	MAP-LVX101	EPOXY HARDENER	MAP-LVX101/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	MAP-LVX270	MAP-LV CATALYST	MAP-LVX270/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>



## 12 User Management Main Screen:

1. Select Active or Inactive users.

2. Shows a list of users.

3. Disable user

4. Edit user.

5. Add a new user.

### Add a New User:

**1. First Name**

**2. Last Name**

**3. User Name:**

*Note* User Name cannot be edited after it is saved as it will be used to reference all transactions for this user. Be mindful of what you enter in this field before you save.

**4. Suggested User Names:**

The system will recommend some options but other entries are accepted.

**5. Password:**

Must be minimum of 4 alphanumeric characters and entered twice for verification.

**6. Language:**

This language is specific to this user when logged in and overrides the shop language.

**7. Expiration Date:**

This is used for guest painters who may only need this login for a short time.

**8. Preset:**

Based on user **Role; Manager, Painter, or Support**

**9. Is Administrator?:**

This selection will grant the user access to all facets of the program regardless of the preset selected.

**10. Adjust Presets:**

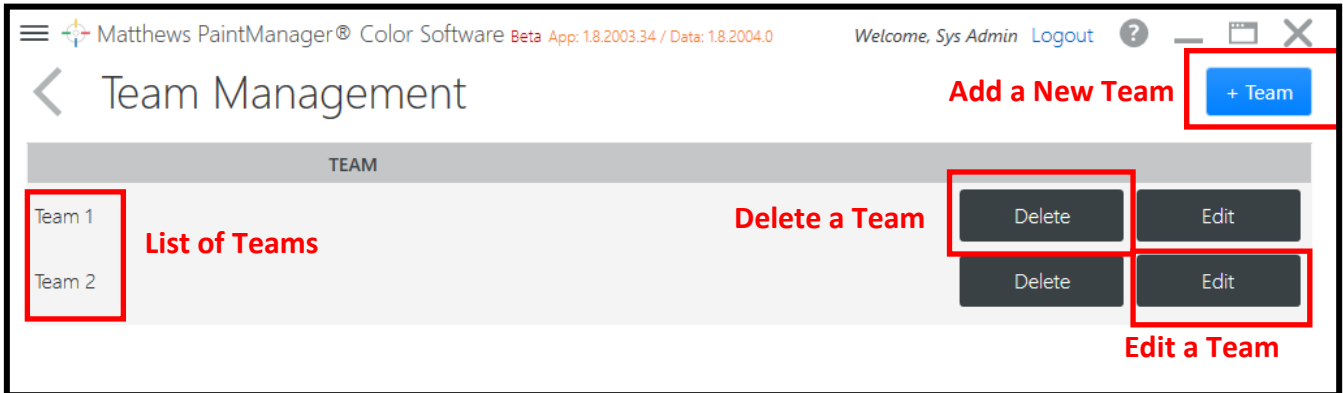
Adjustments can be made to any Preset recommendation.

## User Preset Descriptions:

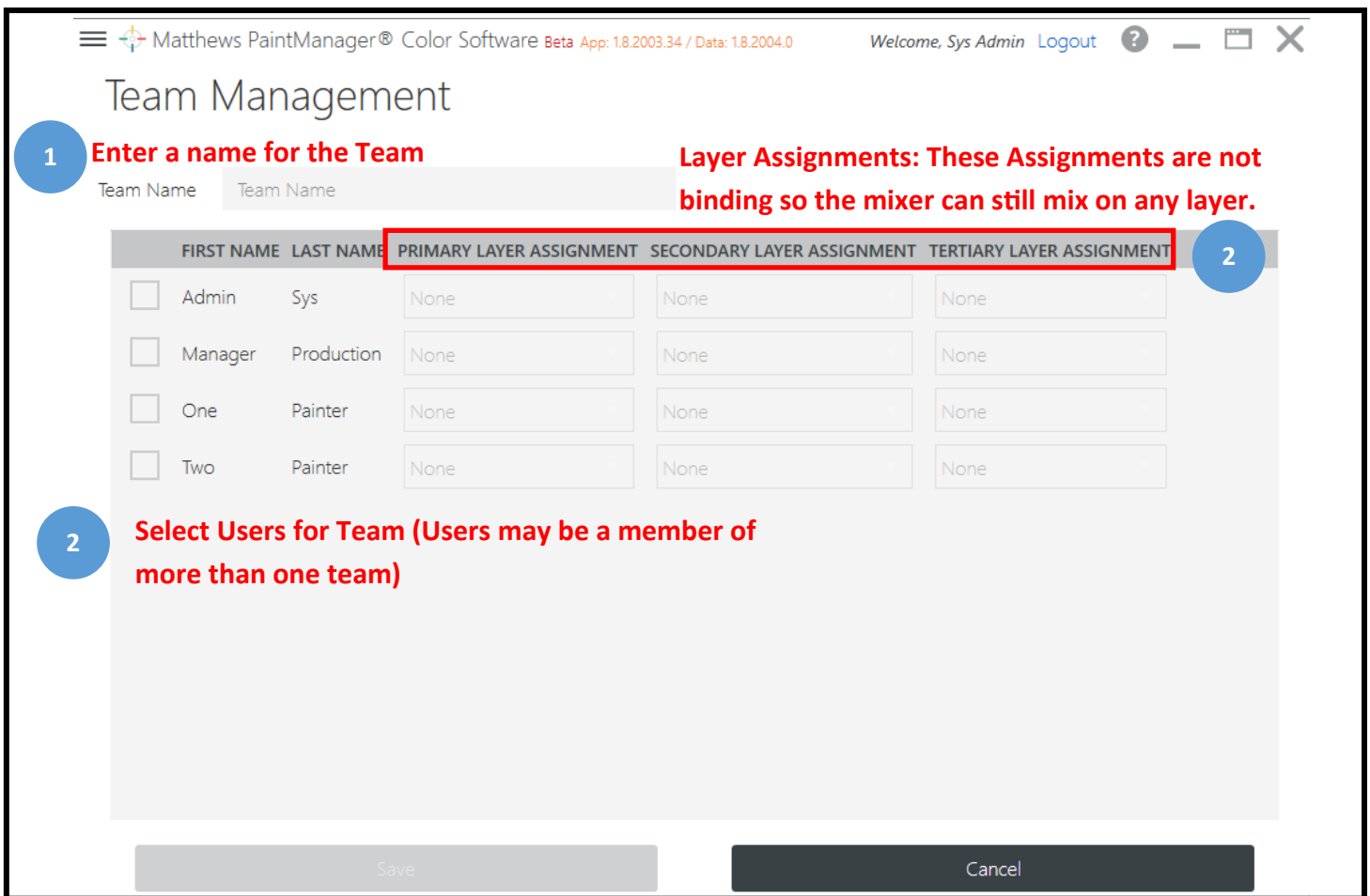
<b>Formulas</b>	<b>Features Available If Selected</b>
Mix Formula	Weigh formulas across the scale
Manage Inventory	Create Sundries, Create Sundry Kits, adjust Pack size and Quantity
View Inventory	View Inventory list but cannot make changes
Record as Mixed	Provide Record as Mixed button on the Mix Session Tab
Formula Tinting	Allow user to tint/adjust formulas
View Pricing	View Pricing in the Inventory and Pricing screen
Manage Pricing	Enter Discounts & Margins percentages, customize pricing
Under / Over Pour Formula	Provides Skip Button on Weigh Screen - option to under/over pour
Manage RTS	Can Edit, Create, Delete RTS Favorites
<b>Custom Formula</b>	
Create / Edit Formulas	Create and Edit custom formulas
<b>Jobs</b>	
Jobs Contributor	Allows mixing to a Job
Jobs Management	Create, Close, Edit jobs and assign Teams & Users to a Job
View Customer List	Create and Edit Contacts and Vendors
Manage Teams	Create and Modify Teams
Modify Closed Jobs	Edit, add mixes to closed Jobs
<b>Application Settings</b>	
Manage Users & Settings	Ability to manage Users
Software Updates	Access to Internet Update and ability to change settings
Application Settings	Grants access to Settings – By default only Admins have this
<b>Reports</b>	
Create Reports	Create new report Templates
Run Reports	Run existing reports
View Reports	View historical saved reports

## 13 Team Management Main Screen:

Team Management is used to capture accurate financial measurements for environments where more than one technician mixes on the same Job. In this event the Team would be measured not the individual.



## Creating a New Team:



## 14 Report Settings

Matthews PaintManager® Color Software Beta App: 1.8.2003.34 / Data: 1.8.2003.37 Welcome, Sys Admin Logout

### Report Settings

Save Cancel

#### Select Reports

Select All

- Gross Profit
- Mix Audit
- Sign Order
- Inventory
- Cost
- VOC & HAPS
- Usage
- Customer

Keep non-VOC Reports for  
365  Days  Years

Keep VOC Reports for  
1,095  Days  Years

#### Summary Reports

Enable Summary Reports

## 15 Language Settings:

Matthews PaintManager® Color Software Beta App: 1.8.2003.34 / Data: 1.8.2004.4 Welcome, Sys Admin Logout

### Language Settings

Save Cancel

1 Language 2 Region

English United States

Numbers Format

Override Regional Defaults

Currency	Grouping Separator	Decimal Symbol
\$	,	.

### 1. Language

This is the program level setting but users can select a different language which overrides this setting when they log in.

### 2. Region

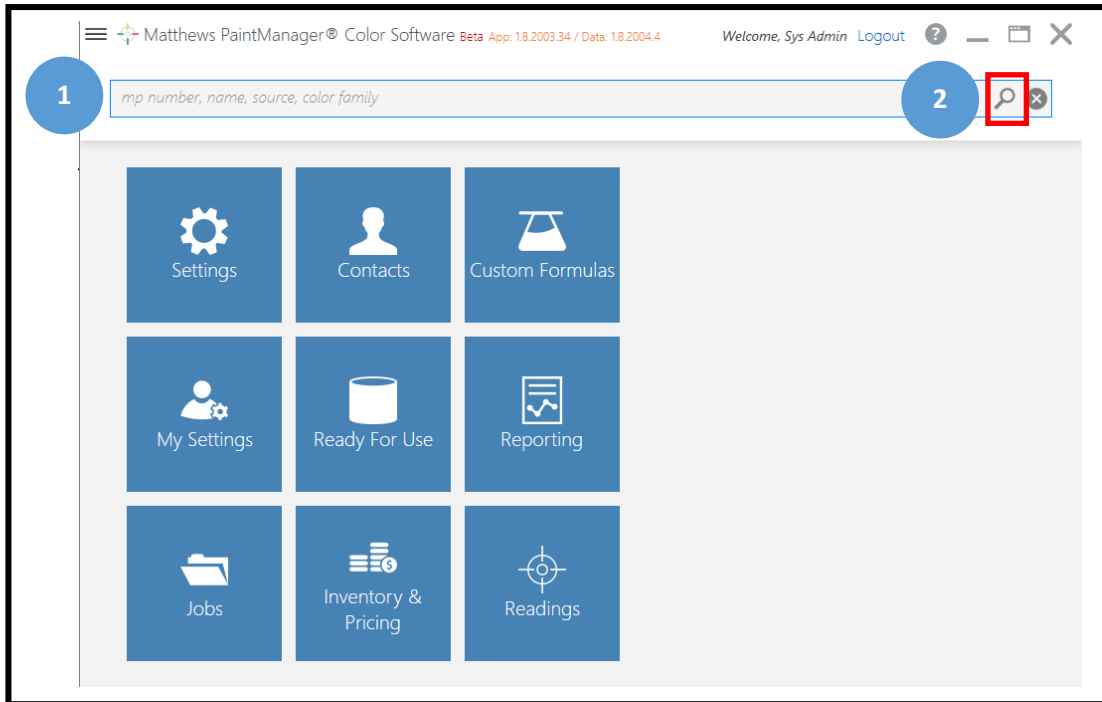
The same language can vary by region, so by combining a language with a region the program will provide a more meaningful translation.

- *Example:* The French language spoken in France is different than the French language spoken in Canada.

### 3. Numbers Format

Customize the formatting option to your region.

# Section 7: Color Search



## 1. Enter Search Criteria

Searchable formula elements include color code, name, source (manufacturer), color family or any combination entering a space between each one.

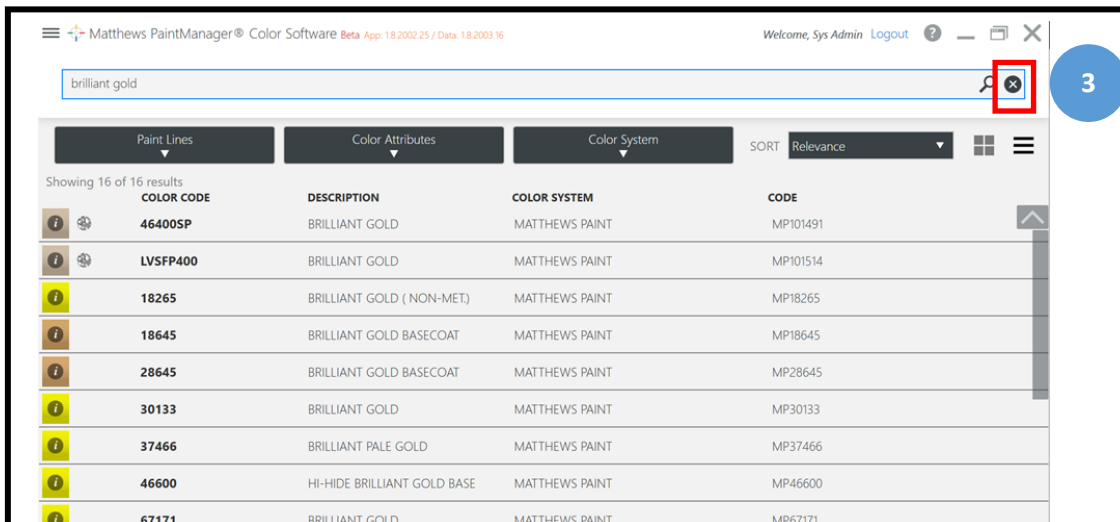
- Wildcard searches using the % symbol for partial criteria searches.

%abc will return any records that **end with** 'abc'

abc% will return any records that **start with** 'abc'

%abc% will return any records that **contain** 'abc'

Wildcard searches include results for all eligible search criteria.



## 2. Search

Initiates a full search with filter options and additional formula information.

## 3. Cancel

Clears all search criteria

## Full Search Results:

Matthews PaintManager® Color Software Beta App: 1.8.2002.25 / Data: 1.8.2003.16

Welcome, Sys Admin Logout

sparkle silver

Paint Lines Color Attributes Color System SORT Relevance

Showing 43 of 43 results

<p>KOJIS SIGNS, INC <b>R105522 SPARKLE SILVI</b> SILVER</p> <p>BRAND <b>MP68956</b></p>	<p>MATTHEWS PAINT <b>72806</b> SPARKLE SILVER METALLIC</p> <p>BRAND <b>MP72806</b></p>	<p>MATTHEWS PAINT <b>75830</b> SPARKLE SILVER</p> <p>BRAND <b>MP75830</b></p>	<p>AKZO <b>629 A-5</b> SPARKLE SILVER METALLIC</p> <p>BRAND <b>MP72806</b></p>	<p>MATTHEWS PAINT <b>MP86374</b> CPM 329GMA MET SPARKLE SILVER</p> <p>BRAND <b>MP86374</b></p>
<p>MATTHEWS PAINT <b>18074</b> SPARKLE SILVER MET.</p> <p>BRAND <b>MP18074</b></p>	<p>MATTHEWS PAINT <b>21024</b> SPARKLE CHAMPAGNE SILVER</p> <p>BRAND <b>MP21024</b></p>	<p>MATTHEWS PAINT <b>21290</b> SPARKLE SILVER</p> <p>BRAND <b>MP21290</b></p>	<p>MATTHEWS PAINT <b>21291</b> SPARKLE SILVER</p> <p>BRAND <b>MP21291</b></p>	<p>MATTHEWS PAINT <b>21437</b> LIGHT SPARKLE SILVER MET.</p> <p>BRAND <b>MP21437</b></p>

## Revision Results:

Matthews PaintManager® Color Software Beta App: 1.8.2002.25 / Data: 1.8.2003.16

Welcome, Sys Admin Logout

< FORCEFUL ORANGE : 45454 : MP45...

MP NUMBER COLOR SYSTEM  
MP45454 MATTHEWS PAINT

All Paint Lines All Paint Finishes

1 Formula Info

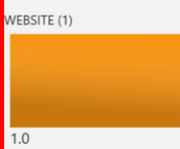
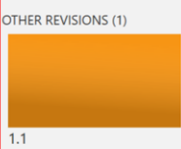
2 Grid or List View

3 Sort by Paint Lines or Finishes

4 Website: Published formula Best match to the standard.

5 Other Revisions: Custom formula linked to the original formula.

N SATIN

WEBSITE (1)	OTHER REVISIONS (1)
 1.0 6/23/2015 64262464	 1.1 6/23/2015 64262464

SV SATIN

WEBSITE (1) OTHER REVISIONS (1)

SV

## Compare Formulas:

**Compare Selected formulas** 3 4 **Clear selections**

1 **Select the Tools Menu to Compare. The 1st formula selected becomes the anchor**

2 **Collapse/Expand Paint System**

2 **Select up to 4 formulas to compare.**

MP NUMBER: MP45454  
COLOR SYSTEM: MATTHEWS PAINT

All Paint Lines | All Paint Finishes

N SATIN

WEBSITE (1) | OTHER REVISIONS (1)

1.0 | 1.1

Compare | Compare

**Toggle UOM**

5 6

**Anchor Formula**

**Compare**

Code | Description | INCREMENTAL

**Toggle View**

N942	662.6 g	INCREMENTAL
N202	252.8 g	INCREMENTAL
N940	84.1 g	INCREMENTAL
N930	22.0 g	INCREMENTAL

5. Change Volume  
6. Change unit of measure

Remove from Comparison | Proceed to Mixing

Remove | Mix | Remove | Mix

## Formula and Mixing:

Matthews PaintManager® Color Software Beta App: 1.8.2003.34 / Data: 1.8.2004.12 Welcome, Sys Admin Logout

### Formula & Mixing

#### Formula Details

## FORCEFUL ORANGE : 45454 : MP45454

CODE	PAINT LINE	PAINT FINISH	COMMENTS
MP45454	N	N SATIN	COMPUTER FORMULA NO/MIX

VOC Cost Send

Base	9.01 lbs/gal	1 pt	510.701 g	
ORDER	CODE	DESCRIPTION	INCREMENTAL	CUMULATIVE
1	×	N942 GREEN YELLOW	331.3 g	331.3 g
2	×	N202 WHITE	126.4 g	457.7 g
3	×	N940 RED YELLOW	42.0 g	499.7 g
4	×	N930 LIGHT RED	11.0 g	510.7 g

+ Reduction

1. Layers: CLEAR, Main Layer, PRIMER

2. +Undercoat +Color +Clearcoat

3. Pour Target: Base Product

4. - 1 + U.S. Pints

5. U.S. Pints

6. U.S. Pints

7. Minimum

8. Mix Formula in: One Can

1. **Layers:** The largest diamond is the selected layer
2. **Add Layers:** Access to layer Favorites, Master List, and new Color searches.
3. **Pour Target:** Mix quantity is calculated based on this selection.
  - Base Product:** (For Color Only)
    - Includes toner only, no reduction components.
    - Used by Volume Estimator to calculate quantity per panel without reduction.
  - Total Product:** Ready-For-Use quantity for Undercoats and Clearcoats.
4. **Quantity:** Select quantity for chosen Pour Target.
5. **Unit of Measure:** Change from fluid ounces to gallons, quarts, etc..
6. **Volume / Gravimetric:** Change from volume to weight for quantity selection.
7. **Minimum:** Calculates the smallest formula that can be mixed based on components in the formula.
8. **Mix Containers:**
  - One Can:** Base and Reduction components to be mixed in the same container in one step.
  - Two Cans:** Base product to be mixed in step one, reduction in a step two. This allows reduction components to be mixed in a separate can or to be added to the original can at a later time.



## Formula Details:

Matthews PaintManager® Color Software Beta App: 18.2002.25 / Data: 18.2003.22

Welcome, Sys Admin Logout

### Formula & Mixing

Main Layer

+Undercoat +Color +Clearcoat

Pour Target: Base Product

1 U.S. Quarts

Minimum

Mix Formula in: One Can

### Formula Details

#### Mix Session

## FORCEFUL ORANGE : 45454 : MP45454

CODE	PAINT LINE	PAINT FINISH	COMMENTS
MP45454	N	N SATIN	COMPUTER FORMULA NO/M...

VOC Cost Send

Base		9.01 lbs/gal	1 qt	1021.402 g
ORDER	CODE	DESCRIPTION	INCREMENTAL	CUMULATIVE
1	N942	GREEN YELLOW	662.6 g	662.6 g
2	N202	WHITE	252.8 g	915.4 g
3	N940	RED YELLOW	84.1 g	999.4 g
4	N930	LIGHT RED	27.5 g	1021.4 g

13

9 - Reduction

Reduction		7.49 lbs/gal	0.667 qt	566.235 g
ORDER	CODE	DESCRIPTION	INCREMENTAL	CUMULATIVE
5	43270SP	UNIVERSAL CATALYST	297.1 g	1318.5 g
6	45280SP	WARM TEMPERATURE REDUCER	269.1 g	1587.6 g

11

12

Total		8.40 lbs/gal	1.667 qt	1587.6 g
-------	--	--------------	----------	----------

**9. Reduction:** Access to reduction Favorites and the Master List.

**10. Base:** Calculated Base amount.

**11. Reduction:** Calculated Reduction amount.

**12. Total:** Calculated Total for Base plus Reduction amounts.

**13. Product Indicators:**

“X” denotes there is not enough inventory to mix this product. (Only shows up if Inventory is selected in Settings.)

“L” denotes a limited use toner when present.

**14. VOC:** VOC and HAPS information.

**15. Cost:** Will display the cost and/or price depending on what is selected in Settings.

**16. Send:** Print a formula label, formula paper printout, or send email formula.

**17. Tools Menu:**

**Delete Layer:** You can only delete the selected layer prior to mixing.

**Save as a Custom Formula:** Creates a Custom Formula from the selected layer.

# Section 8: Mix Management

## Mix Session:

Matthews PaintManager® Color Software Beta App: 18.2002.25 / Data: 18.2003.16

Welcome, Sys Admin Logout

Formula Details

Mix Session

MAP Gloss Clear  
Target Total: 1 qt

FORCEFUL ORANGE : 45454 : MP45454  
Satin MAP  
Target Base: 1 qt Target Reduction: 0.667 qt

Gray Epoxy Primer 2.1 VOC  
Target Total: 1 qt

1. Mix Session Tab

2. Selected Layer

3. Layer Information

4. Finish Mix Later: Sends to the Mix Queue and/or Job Layer Tab

5. Mix by weighing on the scale

6. Record as mixed without weighing.

4. Finish Mix Later

## Job Association:

Jobs

1. + Job

Active Job History

Sign Order Filter 2. All Jobs and Estimates SORT Due Date Ascendi...

Order 5678 No mixes assigned 3.

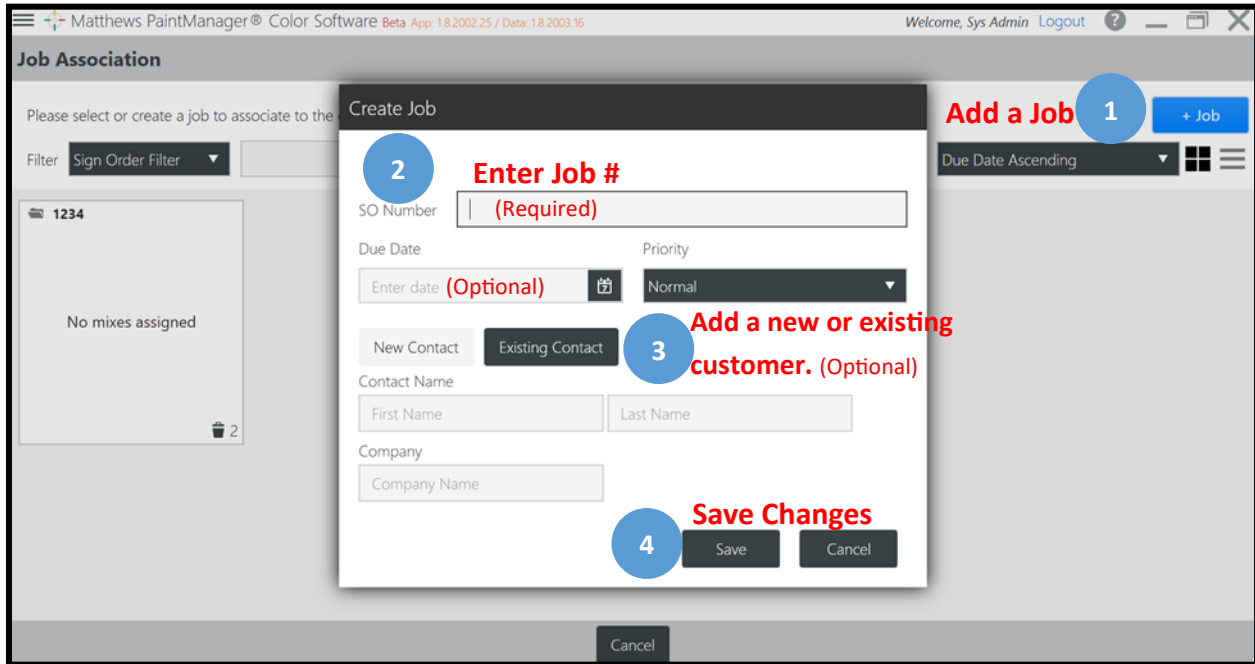
Order 1234  
MP45454  
FORCEFUL ORANGE  
N SATIN  
1.0  
5/1/2020  
Sign Shop 1-J. Smith

1. Add a Job. A new Job can only be created if Job Costing is selected in Application settings.

2. Search for an existing Job. You can begin typing a Job number in the search box to locate a specific job.

3. A Job can be selected directly from the Job list.

## Adding a Job:



## Weigh on the Scale:

**1** Place the can on the scale and press Continue

FORCEFUL ORANGE : 45454 : MP45454

CODE	PAINT LINE	PAINT FINISH	COMMENTS
MP45454	N	N SATIN	COMPUTER FORMULA NO/MIX

MAIN LAYER

COLOR	1 qt
REDUCTION	0.667 qt
TOTAL	1.667 qt

(Ready For Use)

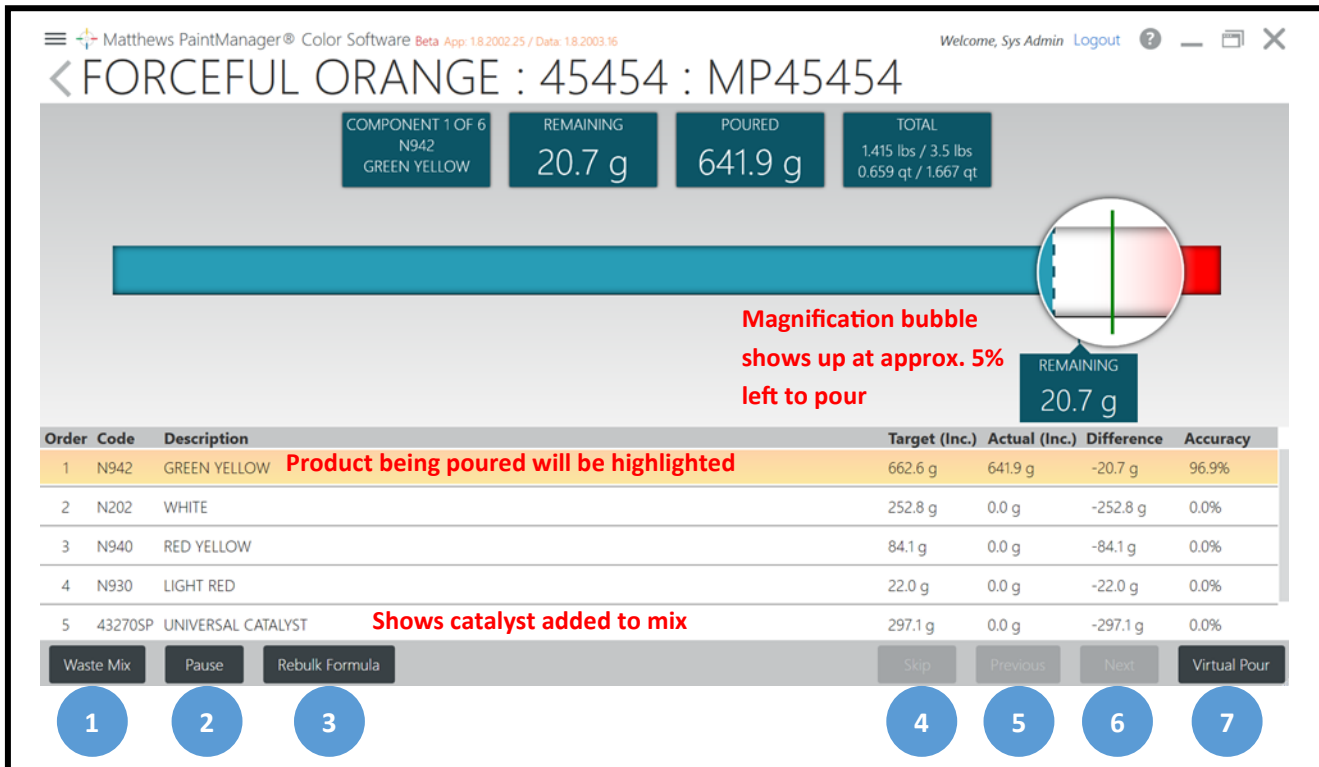
**2** Shows the volumes for color, reducer (selected in mix session) and RFU

**3** Virtual Scale

**4** Select continue when ready to weigh

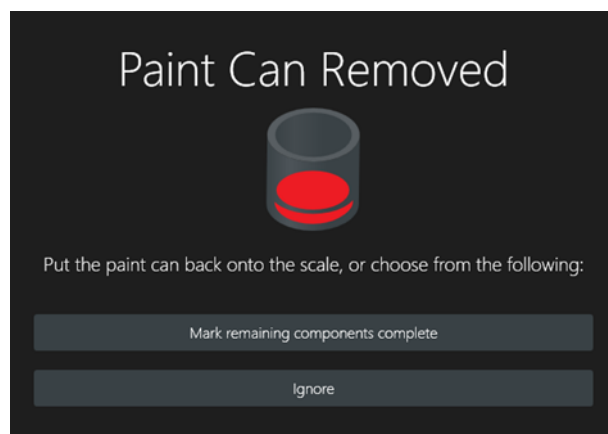
Continue

Default Scale from Settings.  
Other scales can be selected if they are configured in Scale Settings.



- 1. Waste:** Select to waste a mix. If this feature is configured to be enforced in Application Settings a waste reason will have to be selected. Otherwise it is optional.
- 2. Pause:** The paused mix is added to the Mix Queue and flagged on the Job layer screen where the mix can be finished at a later time.
- 3. Rebulk Formula:** In the event of an over pour this option can be used to correct the formula. If selected the program will move back to the first component to correct components already poured.
- 4. Skip:** Allows the mixer to advance to the next component when it is not poured to minimum tolerance. This button is only available if "Under /Over Pour Formula" is selected in User Management.
- 5. Previous:** User can select a previous component.
- 6. Next:** Advance to the next component. When pouring the last component it changes to "Continue".
- 7. Virtual Pour:** This is a default scale that is used for demonstration purposes. It is configured in Scale Settings.

**Note:** Warning displayed if the paint can is removed from the scale before the mix is complete.



## Mix Summary:

Matthews PaintManager® Color Software Beta App: 18.2002.25 / Data: 18.2003.16

Welcome, Sys Admin Logout ?

### Mix Summary

FORCEFUL ORANGE : 45454 : MP45454

Main Layer

CODE: MP45454 PAINT LINE: N PAINT FINISH: N SATIN COMMENTS: COMPUTER FORMULA NO/MIX

1 VOC 2 Cost 3 Send

BASE COMPONENTS		Target: 1 qt	Actual: 1 qt				
Order	Code	Description	Target (Inc.)	Actual (Inc.)	Difference	Accuracy	
1	N942	GREEN YELLOW	662.6 g	662.7 g	0.1 g	100.0%	
2	N202	WHITE	252.8 g	252.9 g	0.1 g	100.0%	
3	N940	RED YELLOW	84.1 g	84.1 g	0.0 g	100.0%	
4	N930	LIGHT RED	22.0 g	22.0 g	0.0 g	100.0%	

REDUCTION COMPONENTS		Target: 0.667 qt	Actual: 0.667 qt				
Order	Code	Description	Target (Inc.)	Actual (Inc.)	Difference	Accuracy	
5	43270SP	UNIVERSAL CATALYST	297.1 g	297.1 g	0.0 g	100.0%	
6	45280SP	WARM TEMPERATURE REDUCER	269.1 g	269.1 g	0.0 g	100.0%	

TOTAL Target: 1.667 qt Actual: 1.667 qt

4 Reweigh 5 Split Mix 6 To Mix Session 7 Finished

1. **VOC:** View VOC Information
2. **Cost:** View Cost and/or Price depending on selections in Settings.
3. **Send:** Print Label via label or computer printer. Print or email the Mix Summary.
4. **Reweigh:** Return to the Weigh Screen.
5. **Split Mix:** Assign portions of mix to other Jobs. (See Job Management)
6. **To Mix Session:** Return to Mix Session.
7. **Finished:** Completes mix.

# Split Mix:

Matthews PaintManager® Color Software Beta App 18.2002.25 / Data 18.2003.16 Welcome, Sys Admin Logout

## Mix Summary FORCEFUL ORANGE : 45454 : MP45454

Main Layer CODE PAINT LINE PAINT FINISH COMMENTS  
MP45454 N N SATIN COMPUTER FORMULA NO/MIX

VOC Cost Send

BASE COMPONENTS Target: 1 qt Actual: 1 qt

Order Code	Description	Target (Inc.)	Actual (Inc.)	Difference	Accuracy
1	N942 GREEN YELLOW	g	662.7 g	0.1 g	100.0%
2	N202 WHITE	g	252.9 g	0.1 g	100.0%
3	N940 RED YELLOW	g	84.1 g	0.0 g	100.0%
4	N930 LIGHT RED	g	22.0 g	0.0 g	100.0%

REDUCTION COMPONENTS Target: 0.667 qt

Order Code	Description	Actual (Inc.)	Difference	Accuracy	
5	43270SP UNIVERSAL CATALYST	g	297.1 g	0.0 g	100.0%
6	45280SP WARM TEMPERATURE REDU	g	269.1 g	0.0 g	100.0%

TOTAL Target: 1.667 qt Actual: 1.667 qt

Reweigh Split Mix To Mix Session Finished

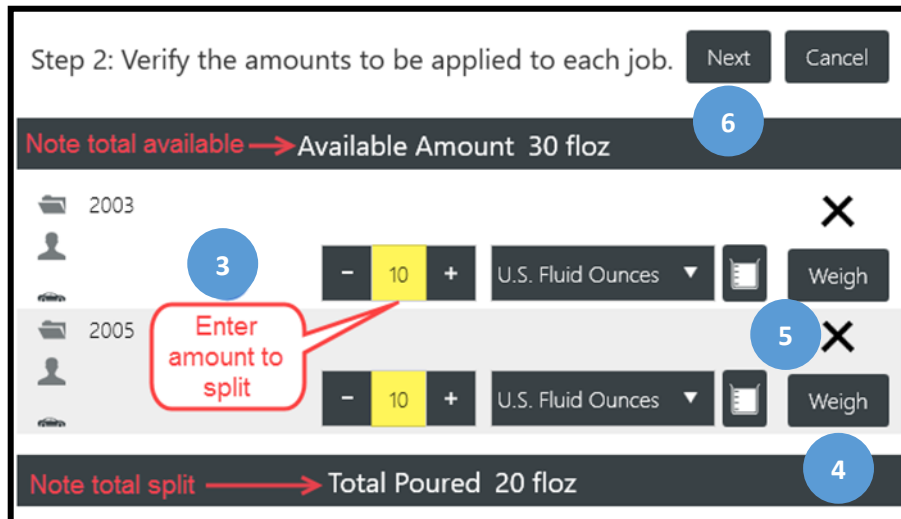
Step 1: Select jobs to be used for splitting the mix. Next Cancel

SO Number

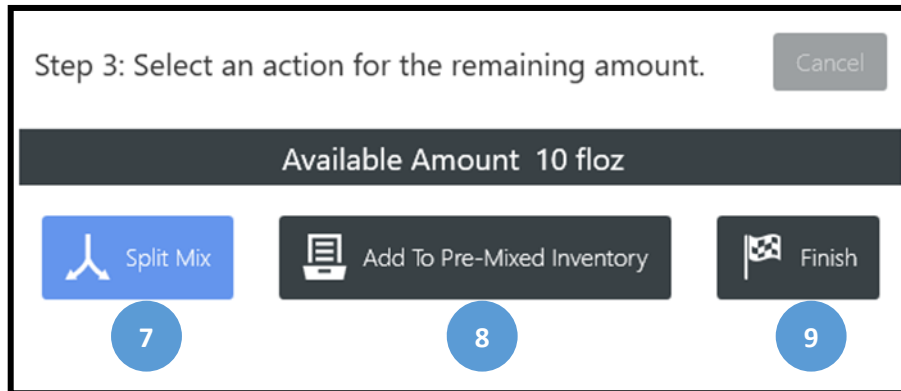
RO#	CUSTOMER	VEHICLE	PRIORITY	DUE DATE
<input type="checkbox"/>				
<input type="checkbox"/>	1000		Normal	
<input type="checkbox"/>	2000		Normal	
<input type="checkbox"/>	2002		Normal	
<input checked="" type="checkbox"/>	2003		Normal	
<input type="checkbox"/>	2004		Normal	
<input checked="" type="checkbox"/>	2005		Normal	

Select one or more jobs to split the mix to

1. Select one or more Jobs.
2. Next: Hit Next to continue to Split Mix.



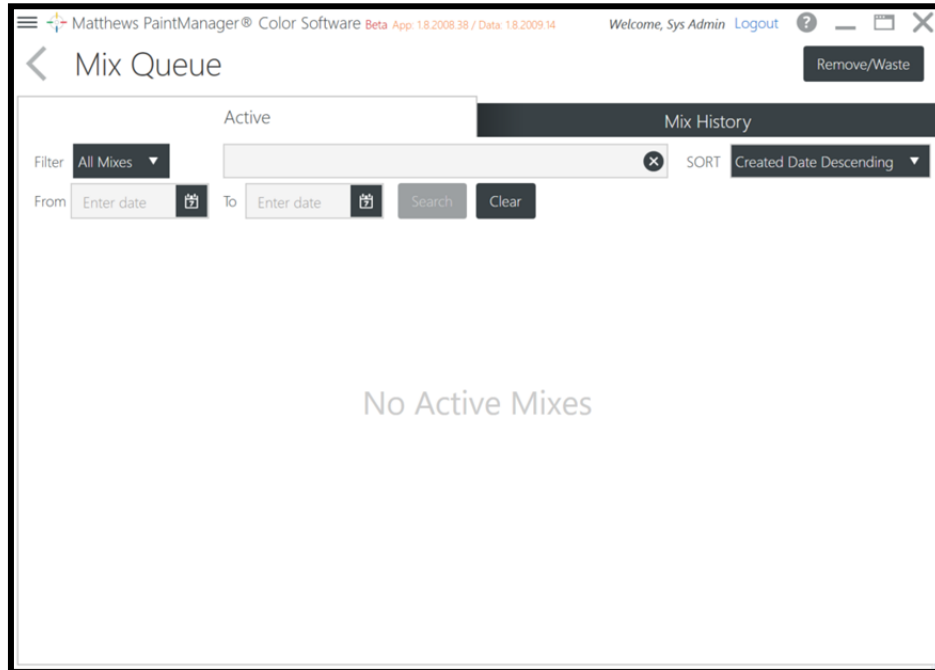
3. **Enter amount to split.**
4. **Weigh:** (optional) Weigh the product to split.
5. **Remove:** Delete Job from the Split.
6. **Next:** Hit Next when ready to apply Split.



7. **Split Mix:** Continue Split Mix to additional Jobs.
8. **Add to Pre-Mixed Inventory:** To use for future jobs not yet created.
9. **Finish:** Leaves the remaining amount on the original Job used to begin the Split.

## Mix Queue Active Tab:

All mixes are captured in the Mix Queue. Mixes in process are captured in the Active tab and completed mixes are moved to the Mix History tab. Mixes that take place on Jobs can be viewed in the Mix Queue or in the individual Job screen. Mixes not recorded on a Job can be located here in the Mix Queue.



### 1. Filter by mix types:

- All Mixes
- Paused Mixes
- Mixes not Started
- Unreduced Mixes

### 2. Filtered Search:

- Description
- Customer

### 3. Date filtered search

### 4. Sort Options

### 5. Tools Menu

**Waste:** Only available for mixes that are started

**Reduce Now:** Only available for mixes with base product already mixed

**Remove:** Available for mixes that not started (Nothing has been mixed yet)

**Select:** Proceed to the Formula and Mixing screen

**View Job:** Navigate to the job associated with the mix

**Mix Summary:** Proceed to the Mix Summary screen

### 6. Remove/Waste: Select multiple mixes to be removed or wasted.

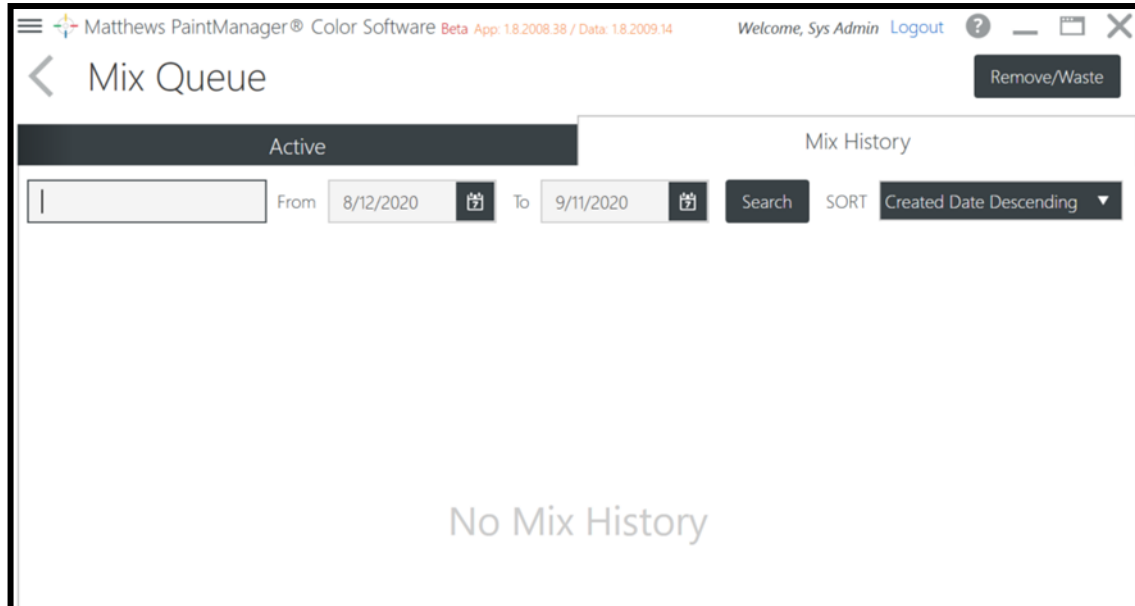
Mixes not started can be removed.

Mixes started can be wasted.



## Mix Queue Mix History Tab:

All mixes are captured in the Mix Queue. Mixes in process are captured in the Active tab and completed mixes are moved to the Mix History tab. Mixes that take place on Jobs can be viewed in the Mix Queue or in the individual Job screen. Mixes not recorded on a Job can be located here in the Mix Queue.



1. Customer search
2. Date range search
3. Sort options
4. Tools menu

Waste Mix: Available for mixes not already wasted. (Wasted mixes cannot be un-wasted.)

Mix More: Not available for mixes that have been wasted.

Mix Summary: Navigate to the Mix Summary.

View Job: Navigate to the Job screen.

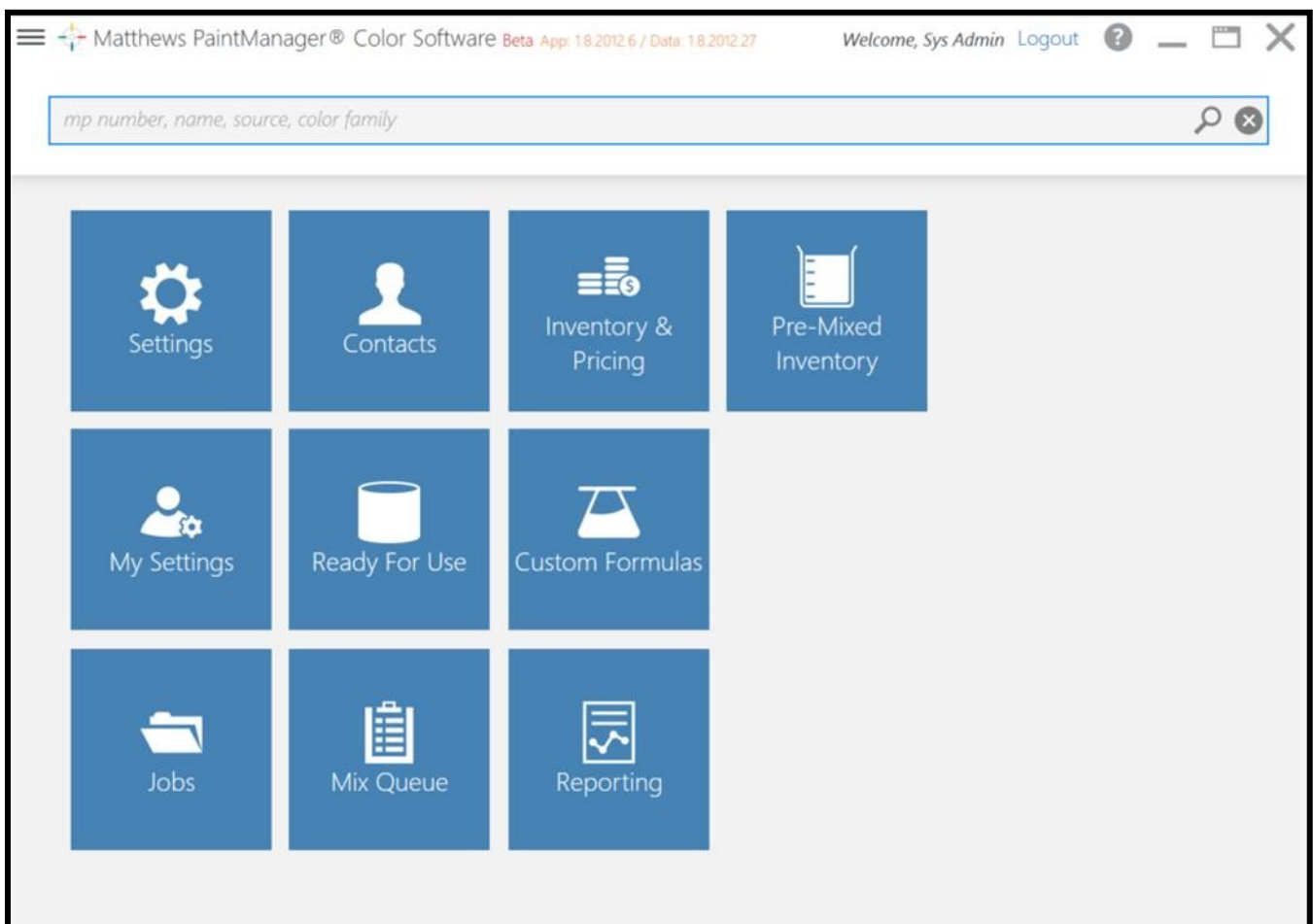
5. **Remove/Waste:** Select multiple mixes to be removed or wasted.
  - Mixes not started can be removed.
  - Mixes started can be wasted.

## Pre-Mixed Inventory:

This inventory is comprised of two kinds of mixes.

**Internal Inventory:** Formulas mixed with product in the mixing room added by selecting the “Add to Pre-Mixed Inventory” option after selecting to Mix on the scale. These mixes deplete the mixing room inventory and will be noted on the Inventory and Pricing screen. They will then be depleted from Pre-Mixed Inventory in whole or in part at a later time and potentially directed to one or more Jobs.

**External Inventory:** Example: Formulas mixed by Jobbers or a PPG blend center added here. This added product does not create an increase to the internal inventory seen on the Inventory & Pricing screen. These mixes are then depleted from Pre-Mixed Inventory in whole or part at a later time and potentially directed to one or more Jobs. These mixes are added from the Formula Details screen on the Tools menu or using the +Manual Mix on the Pre-Mixed Inventory screen.



## Manual Mix added to Pre-Mixed Inventory:

1. **+ Manual Mix:** Used to add a mix from external sources.

2. **Tools Menu:**

**Waste:** Waste the mix. (Once wasted it cannot be un-wasted.)

**Mix Summary:** Navigate to the Mix Summary screen.

**Transfer Mix:** Transfer the entire mix to a Job.

**Split Mix:** Transfer all or part of a mix to one or more Jobs.

**Reduce All:** Reduce the entire mix potentially adding it to a Job.

**Reduce Partial:** Reduce a partial amount potentially adding it to a Job.

Status	Description	Amount	Mixed Date	Mixed By	Tools Menu
🔇	JOHN DEERE GREEN : 33317 : MP33317 (Main Layer)	0.7 gal	12/4/2020 12:01:36 PM	Painter 1	🔧
🔇	FLASH RED : MP12019 : MP12019 (Main Layer)	1 gal	1/5/2021 8:39:53 AM	Sys Admin	🔧
🔇	STEAMBOAT BLUE : MP25133 : MP25133 (Main Layer)	3 gal	1/5/2021 8:40:54 AM	Sys Admin	🔧
🔇	RATTLEBOX YELLOW : MP05185 : MP5185 (Main Layer)	1 gal	1/5/2021 8:41:41 AM	Sys Admin	🔧
🔇	206 C - C COLORS : 206 C - C COLORS : MP245 (Main Layer)	3 qt	1/5/2021 8:43:49 AM	Sys Admin	🔧

**+ Manual Mix**

COLOR CODE: [ ]  
DESCRIPTION: [ ]

PAINT LINE: FM  
PAINT FINISH: FM FULL-GLOSS

VOLUME: [ - 0 + ] U.S. Quarts  
DENSITY: [ - 0 + ] lbs/gal

VOLATILES WT. %: [ - 0 % + ]  
WATER WT. %: [ - 0 % + ]  
EXEMPT WT. %: [ - 0 % + ]

VOHAPS: [ - 0 + ] lbs/gal  CONTAINS LEAD

FINISH EFFECT: Solid  
USAGE: Exterior  
COLOR SYSTEM: Search and select a manufacturer

COST: [ - ] +      PRICE: [ - ] +

Save Cancel

## Adding a Mix from the Pre-Mixed Inventory Screen:

Status	Description	Amount	Mixed Date	Mixed By
●	JOHN DEERE GREEN : 33317 : MP33317 (Main Layer)	0.7 gal	12/4/2020 12:01:36 PM	Painter 1
●	FLASH RED : MP12019 : MP12019 (Main Layer)	1 gal	1/5/2021 8:39:53 AM	Sys Admin
●	STEAMBOAT BLUE : MP25133 : MP25133 (Main Layer)	3 gal	1/5/2021 8:40:54 AM	Sys Admin
●	RATTLEBOX YELLOW : MP05185 : MP5185 (Main Layer)	1 gal	1/5/2021 8:41:41 AM	Sys Admin
●	206 C - C COLORS : 206 C - C COLORS : MP245 (Main Layer)	3 qt	1/5/2021 8:43:49 AM	Sys Admin

## Adding a Mix from the Formula Details Screen:

It is much simpler to add mixes to the Pre-Mixed Inventory from this screen. Look up the formula and select the “Add to Pre-Mixed Inventory” option on the Formula Details screen Tools menu.

Formula & Mixing

Main Layer

+Undercoat +Color +Clearcoat

Pour Target: **Base Product**

- 1 + U.S. Quarts

Minimum

Mix Formula in: One Can

Formula Details

Mix Session

206 C - PLUS SERIES C : 206 C - PLUS SERIES C...

CODE	PAINT LINE	PAINT FINISH	COMMENTS
MP78318	N	N SATIN	R134121 AD DISPLAY SYSTEM, RS TO PM5+, NS, KS, 2-18-14

VOC Cost Send

Base 8.82 lbs/g

ORDER	CODE	DESCRIPTION
1	N930	LIGHT RED
2	N947	SCARLET
3	N914	DARK RED
4	N202	WHITE

Delete Selected Layer

Save as Custom Formula

Add To Pre-Mixed Inventory

+ Reduction

# Section 9: Job Management & Job Costing

## Jobs Main Screen Tile View – Active or Open Jobs:

Active Tab shows Open Jobs

Job History shows Closed

1. Search filter criteria and search field.

2. Job screen filter options

3. Job screen sort options

4. Tile & List view selection

5. Create a new Job

2 Clear Layer mixes—1 or 2 unmixed. Color layer mixed and reduced. Undercoat layer mixed.

Wasted Mix Count

- Layer added to Job - not mixed
- Color layer added to Job - mixed not reduced
- Layer added to Job - mix complete

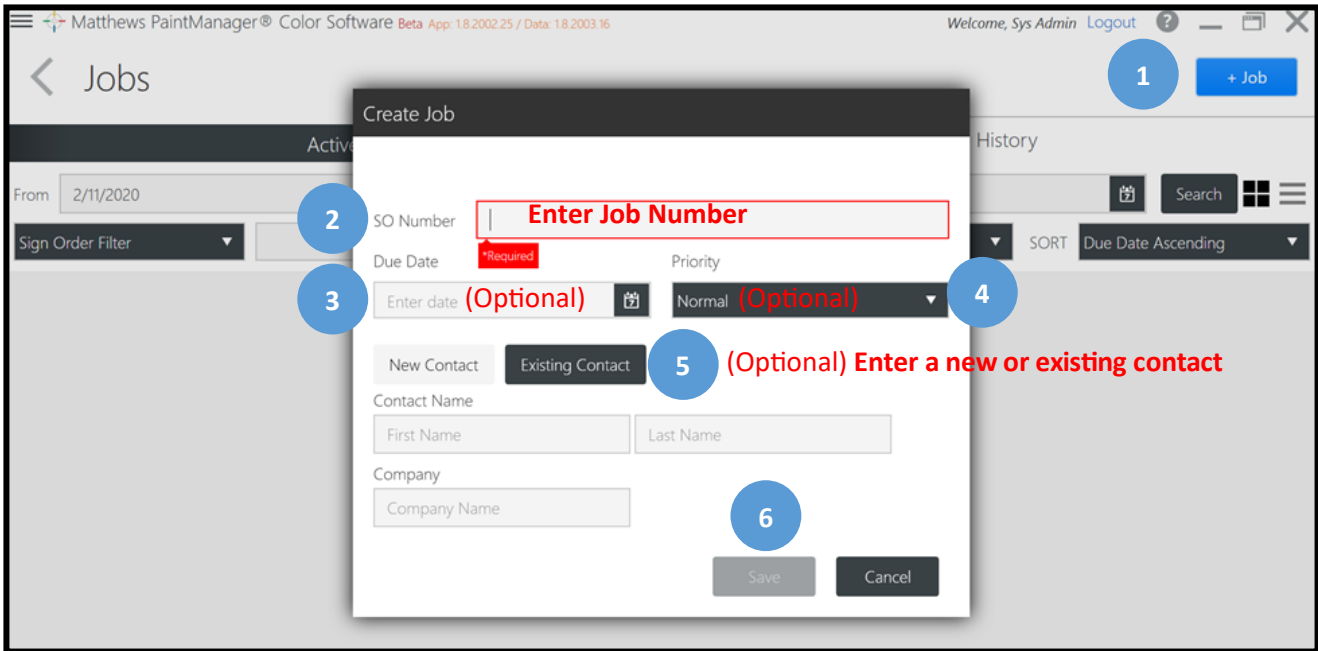
## Job Main Screen – Job History or Closed Jobs:

The Job History screen comes up blank initially and a date range must be selected to populate the screen.

1. Enter date range for your search (default is set to 30 days).

2. Search to populate all completed jobs within the selected time frame.

## Add a New Job:



## Job Layer Tab:

**Layers Tab**

Status	Description	Amount	Mixed Date	Mixed By
	123 C - C COLORS : 123 C - C COLORS : MP59554 (Main Layer) - Satin MAP	0.63 qt	3/4/2020 6:19:07 PM	Duane D
	CINNAGOLD DUST CUSTOM : R162871 CINNAGOLD DUST CUSTOM : MP91100 (Main Layer)	0.635 qt	3/9/2020 10:03:30 AM	PabloP
	FORCEFUL ORANGE : 45454 : MP45454 (Main Layer) - Satin MAP	1.667 qt	3/12/2020 1:08:10 PM	Duane D
	Gray Epoxy Primer 2.1 VOC (PRIMER)	1 qt		
	MAP Gloss Clear (CLEAR)	1 qt		

- 1. Edit Job Information**
- 2. Add additional layers**
- 3. Layer marked as wasted**
- 4. Layer marked as rework**
- 5. Layer Tools menu options (See next screen capture for details)**

## Job Layer Tools Menu Options:

(Layer Tool Option availability depends on status of layer)

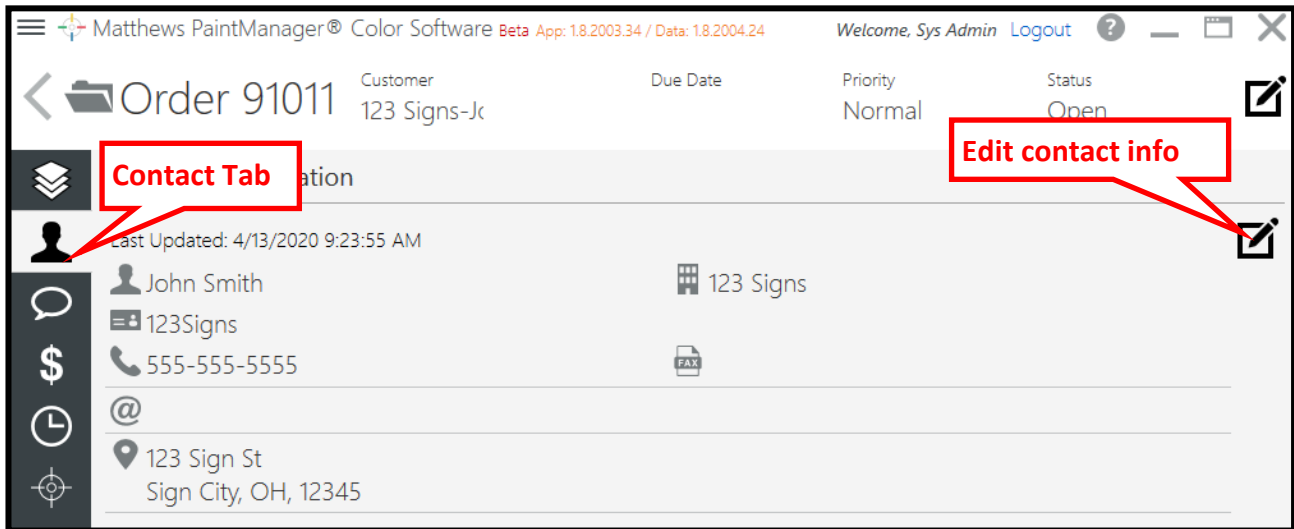
Remove	Removes a selected layer if it has not been mixed.
Waste Mix	Wastes a selected layer if it has been partially or completely mixed.
Mix Summary	Navigates to the layer Mix Summary if it has been mixed.
Transfer Mix	Transfers the entire layer to another selected Job.
Split Mix	Transfers part or entire layer to one or more selected Jobs.
Select	Navigates to Formula & Mixing to mix a layer that has not started.
Reduce Now	Navigates to Formula Details to complete an unreduced color mix.
Mix More	Navigates to Formula & Mixing to Mix More of same layer.
Mark as Rework	Marks layer as rework so it does not show on the invoice or show price.
Clear Rework Flag	Clears the layer marked as rework so it will display on invoice.

## Sundries Tab:

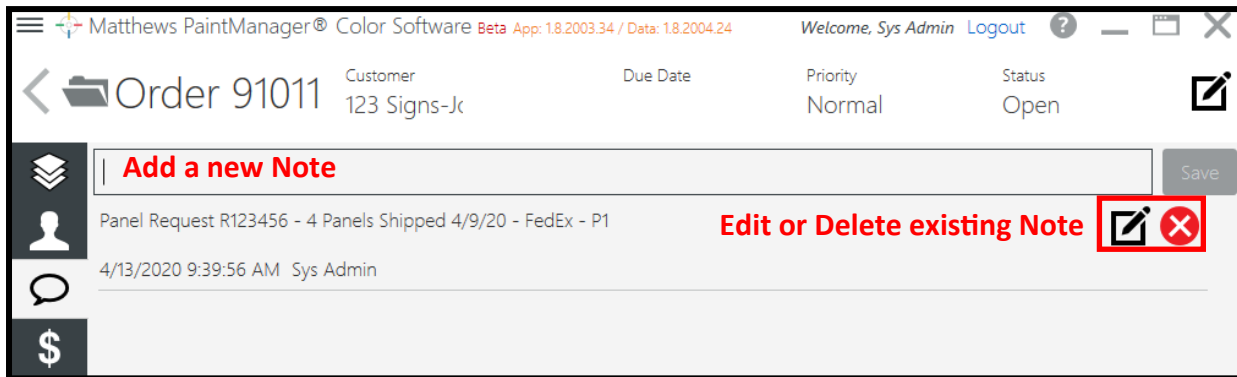
The screenshot shows the 'Sundries Tab' interface. At the top, there are filters for Customer, Due Date, Priority (Normal), and Status (Open). Below these are two buttons: '+ Sundries' and '+ Sundry Kit'. A table lists items with columns for Kit, Product Code, Product Description, Sku, Qty, and Added By. Two items are listed: 'Kit' and 'Bumper Kit', both with Product Code SU4903 and Product Description 'ADVANCED PLASTIC BO...'. Each item has a quantity and is added by 'Sysadmin'. To the right of each item is a dropdown menu with a wrench icon. A sidebar on the left contains various icons for navigation.

Kit	Product Code	Product Description	Sku	Qty	Added By
Kit	SU4903	ADVANCED PLASTIC BO...	SU4903/04	6.00 floz	Sysadmin
Bumper Kit	SU4903	ADVANCED PLASTIC BO...	SU4903/04	4.00 floz	Sysadmin

## Contact Tab:



## Notes Tab:





## Job (\$) Financial Tab:

STATUS	DATE MIXED	PRODUCT DESCRIPTION	MIXED BY	AMOUNT APPLIED	COST	PRICE
▼		Sprayable				
🗑️	3/4/2020	123 C - C COLORS : 123 C - C COLORS : MP59554 - Satin MAP	Duane D	0.63 qt	0.0	
🗑️	3/9/2020	CINNAGOLD DUST CUSTOM : R162871 CINNAGOLD DUST CUSTOM : MP91100	PabloP	0.63 qt	\$35.05	0.0
●	3/12/2020	FORCEFUL ORANGE : 45454 : MP45454 - Satin MAP	Duane D	1.67 qt		
○		Gray Epoxy Primer 2.1 VOC		1.00 qt		
○		MAP Gloss Clear		1.00 qt		

Sprayable Total	\$35.05	\$0.00
Sundries Total	\$0.00	\$0.00
Non-Sprayable Estimate	\$0.00	\$0.00
<b>Invoice Total</b>	<b>\$35.05</b>	<b>\$0.00</b>
Overall Margin		0.0%

Update Missing Prices

**Sprayable:** This section lists all materials mixed across the scale.

**Sundries:** If applicable, this section lists all sundries added from the Sundries tab.

**Cost:** Displays if selected in Settings-Application Settings-Pricing.

Initially populates with the cost in Inventory & Pricing at the time the mix was completed.

If discounts are applied to cost in Inventory & Pricing they will be reflected here.

**Price:** Displays if selected in Settings-Application Settings-Pricing.

Initially populates with the price in Inventory & Pricing at the time the mix was completed.

If margin percentages are applied to price in Inventory & Pricing they will be reflected here.

**Total Sprayables:** Total of the sprayable section.

**Total Sundries:** Total of the sundries section.

**Non-Sprayable Estimate**

This is calculated as a percent of the Job Total. This calculation will subtract the Sundry Total to ensure it does not exceed the non-sprayable percent of Job Total. Based on the value in the Settings-Application Settings/Jobs tab at the time the Job is created. If the Sundry Total exceeds this %, sundries are reported as actual and the Non-Sprayable Estimate will be zero.

This can be adjusted on this screen using the edit button.

**Job Total:** Sprayable Total + Sundries Total + Non-Sprayable Estimate.

**Overall Margin:**

Calculated profit margin from the difference between price and cost on this screen.

**Wasted and rework layers have cost but no price which lowers the overall margin.**

**Run Invoice:**

See Details in the next section.

## Run Invoice Options:

- **The Default Sign Order Invoice:** Non-sprayables are included waste and rework are not.
- Other templates created for the Sign Order Invoice in Reporting will be available here.  
 Example: Waste and rework included  
 Non-sprayables not included

**Note: If the non-sprayable percent is changed to zero the description and zero amount will not print on the invoice.**

Matthews PaintManager® Color Software Beta App: 1.8.2008.38 / Data: 1.8.2009.20  
 Welcome, Sys Admin Logout

**Sign Order Invoice** Customer: test job **PPG Industries**  
 19699 Progress Drive  
 Strongsville OH, 44149

**Test Job**  
 Status Date Created Date Closed  
 Open 9/11/2020 4:23 PM N/A

Sprayable Items							
Mix Date	Category	Description	Mixed By	Amount Applied	Price		
9/11/2020 3:40 PM	Color	VERDEGRIS : 13832 : MP13832	Sys Admin	100 qt	\$43.77		
9/11/2020 3:40 PM	Primer	Gray Epoxy Primer 2.1 VOC	Sys Admin	100 qt	\$55.21		
9/11/2020 3:39 PM	Clear	MAP Gloss Clear	Sys Admin	100 qt	\$0.00		
<b>Sprayable Items Total</b>					<b>\$98.98</b>		
Non-Sprayable Items							
Date Added	Sundry Kit	OEM Code	Description	SKU	Added By	Quantity	Price
9/11/2020 3:29 PM		CAN/01	Paint Can, 1 Gallon	CAN/01	Sys Admin	100 ea	\$0.00
<b>Non-Sprayables Subtotal</b>						<b>\$0.00</b>	
<b>Invoice Total</b>						<b>\$98.98</b>	

## Sign Order Invoice:

Sign Order Invoice			Customer: N/A	PPG Industries	
<b>Scaler Test</b>			19699 Progress Drive Strongsville OH, 44149		
Status	Date Created	Date Closed			
Open	3/13/2020 2:44 PM	N/A			
Sprayable Items					
Mix Date	Category	Description	Mixed By	Amount Applied	Price
3/13/2020 10:46 AM	Color	FORCEFUL ORANGE : 45454 : MP45454	Sys Admin	1.01 qt	\$47.42
				<b>Sprayable Items Total</b>	<b>\$47.42</b>
				<b>Invoice Total</b>	<b>\$47.42</b>

### Print

Sends the report to the report printer designated in Settings-Print Settings.

### Navigation and Sizing Controls:

#### Job Information:

**New:** One line for each mix.

**New:** Time as well as date of mix.

**New:** Product category.

#### Customer Information

#### Shop Information

#### Sprayable Items

#### Sundry Items

#### Non-Sprayable Refinish Materials:

The description that shows up on the invoice comes from Settings/Application Settings/Jobs/Non-Sprayable Line Item Description field.

Is the Non-Sprayable % of Job Total minus any sundries.

**Non-Sprayables Subtotal:** Actual Sundries + the remaining Non-Sprayable Estimate from the Job Financial Screen.

Remember: If there are any sundries, they are subtracted from Non-Sprayable estimate.

**Invoice Total:** Total for all the price elements of Sprayables + Non-Sprayables(includes sundries), from the Job Financial(\$ ) screen.

**Close:** Return to the Job Financial(\$ ) screen.

## Transaction History Tab:

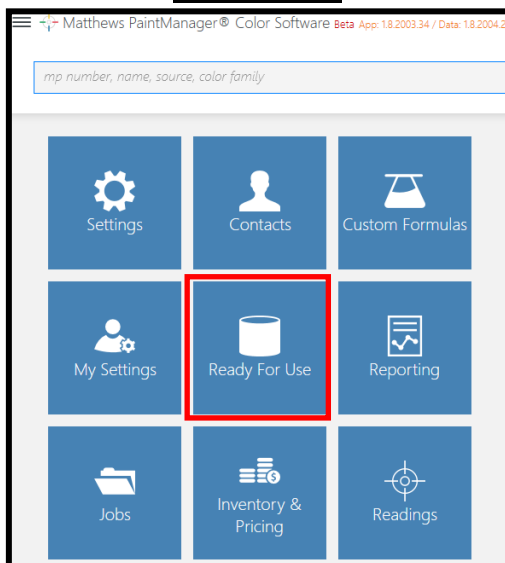
The job transaction tab keeps a record of each change made to the job.

DATE/TIME	ACTIVITY	USER
3/12/2020 1:08:10 PM	Mixed FORCEFUL ORANGE : 45454 : MP45454	Sys Admin
3/12/2020 1:06:07 PM	MAP Gloss Clear has been added	Sys Admin
3/12/2020 1:06:07 PM	FORCEFUL ORANGE : 45454 : MP45454 has been added	Sys Admin
3/12/2020 1:06:07 PM	Satin MAP has been added	Sys Admin
3/12/2020 1:06:07 PM	Gray Epoxy Primer 2.1 VOC has been added	Sys Admin
3/9/2020 10:03:37 AM	CINNAGOLD DUST CUSTOM : R162871 CINNAGOLD DUST CUSTOM : MP91100 layer wasted	Painter 1
3/9/2020 10:02:45 AM	CINNAGOLD DUST CUSTOM : R162871 CINNAGOLD DUST CUSTOM : MP91100 has been added	Painter 1
3/4/2020 6:19:14 PM	123 C - C COLORS : 123 C - C COLORS : MP59554 layer wasted	Sys Admin
3/4/2020 6:15:26 PM	123 C - C COLORS : 123 C - C COLORS : MP59554 has been added	Sys Admin
3/4/2020 6:15:26 PM	Satin MAP has been added	Sys Admin
3/4/2020 6:14:51 PM	Job Created	Sys Admin

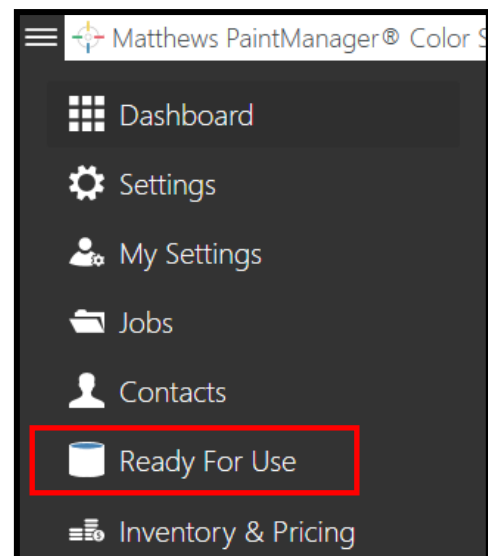
## Ready for Use Selections from the Dashboard or Main Menu:

When jobs are not used, if the user returns to the Dashboard after mixing, the ability to add layers from the Mix Session is lost. In this situation, or at any time, the user can access Ready for Use favorites from the Dashboard or Main Menu. **As a reminder:** Second layers for tri-coat formulas can be accessed from the Mix Queue in the event access to the Mix Session is lost when not using Jobs.

### Dashboard



### Main Menu



## Selecting Undercoats and Clearcoats:

Matthews PaintManager® Color Software Beta App: 1.8.2002.25 / Data: 1.8.2003.16

Welcome, Sys Admin Logout

Ready For Use

Automatically defaults to the Favorites Tab

1 Favorites Master List

All Categories All Paint Lines All Product code search

2

Filter product category

★	N SATIN	43270SP	45280SP	
	3	1	1	

VOC Category:

★	42228SP	43270SP	6396SP	
	3	1	1	

VOC Category: Clear Coating

★	42208SP	43270SP	45280SP	
	3	1	1	

VOC Category: Clear Coating

Select desired RFU combination and proceed to mixing

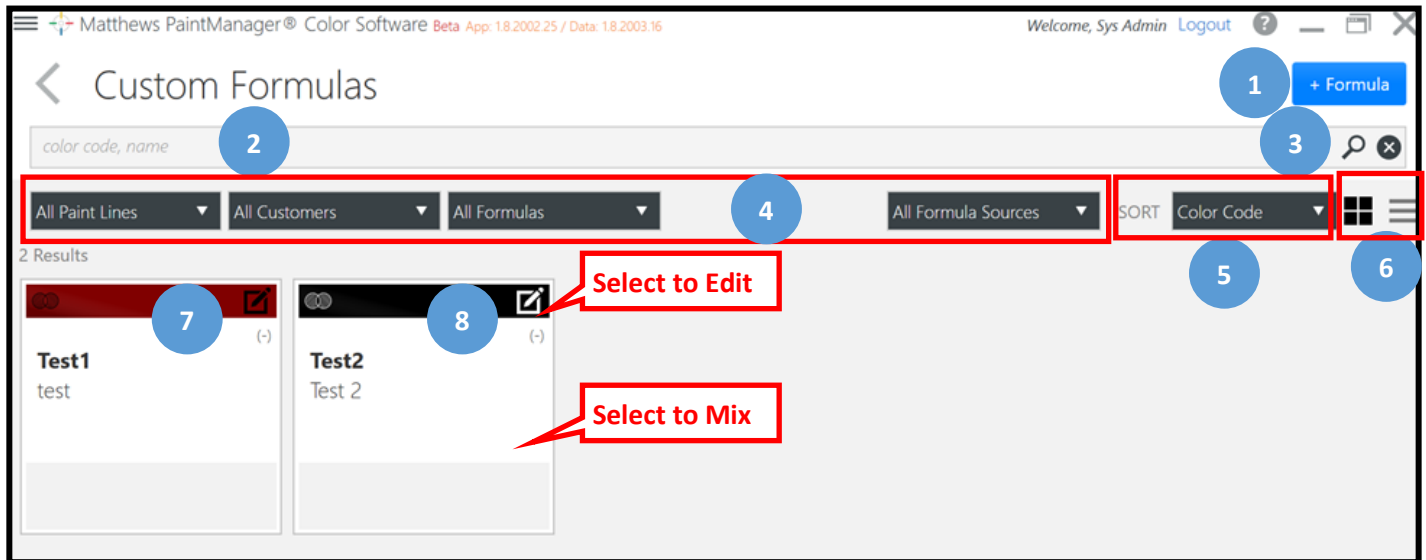
Select

Select

Select

# Section 10: Custom Formulas

## Custom Formula Main Screen:



## Creating a New Custom Formula:

From the Custom Formula screen select the +Formula button. You will then have to fill out all the required and optional formula information, add toners & quantities and save your formula.

### 1. Add New Custom Formula.

### 2. Search for a Custom Formula

Color code, color name, source.

Can combine multiple criteria with a space in between each one.

Follow search criteria order

### 3. Search or Clear Search

### 4. Filter Options

Paint Lines represented in all of the custom formulas.

Specific customer.

Formulas created in My Shop or Online formulas shared thru collaboration.

Formulas linked to original color or those not linked.

### 5. Sort Options

### 6. View Options: (Grid or List)

### 7. Compare

Select up to 4 custom formulas derived from the same paint line and paint code to compare.

### 8. Edit: (More on this later)

### 9. Select and Mix: Touch or click on the tile but not on the edit symbol.

## Creating a Custom Formula From an Existing Formula:

Matthews PaintManager® Color Software Beta App: 1.8.2002.25 / Data: 1.8.2003.16

Welcome, Sys Admin Logout

### Formula & Mixing

Main Layer

+Undercoat +Color +Clearcoat

Pour Target: **Base Product**

- 1 + U.S. Quarts

Minimum

Mix Formula in: One Can

### Formula Details

Mix Session

**FORCEFUL ORANGE : 45454 : MP45454**

CODE PAINT LINE PAINT FINISH COMMENTS  
MP45454 N N SATIN COMPUTER FORMULA NO/MIX

VOC Cost Send

Base 9.01 lbs/gal

ORDER	CODE	DESCRIPTION	INCR
1	N942	GREEN YELLOW	
2	N202	WHITE	
3	N940	RED YELLOW	
4	N930	LIGHT RED	22.0 g 1021.4 g

Delete Selected Layer

Save as Custom Formula

+ Reduction

1. Lookup the desired code.
2. Select any amount greater than the minimum allowed.
3. Choose the Tools Menu
4. Select Save as Custom Formula, then edit as needed and save.

## Creating a Custom Formula From Scratch:



From the Custom Formula screen select the +Formula button. You will then have to fill out all the required and optional formula information, add toners & quantities and save your formula.

Matthews PaintManager® Color Software Beta App: 1.8.2008.38 / Data: 1.8.2009.20

Welcome, Sys Admin Logout

### Formula & Mixing

Main Layer

+Undercoat +Color +Clearcoat

Pour Target: **Base Product**

- 1 + U.S. Quarts

Minimum

Mix Formula in: One Can

### Formula Details

Mix Session

**LIGHTER RED : 74832 : MP74832**

CODE PAINT LINE PAINT FINISH COMMENTS  
MP74832 N N SATIN R120897 MAGNA SIGN CORP R5 RO CMYK, NS, SY 6-25-12

VOC Cost Send

Base 8.64 lbs/gal

ORDER	CODE	DESCRIPTION	INCR
1	N942	GREEN YELLOW	
2	N947	SCARLET	
3	N914	DARK RED	202.4 g 923.4 g
4	N202	WHITE	56.4 g 979.8 g

Delete Selected Layer

Save as Custom Formula

+ Reduction

## Custom Formula Edit— Components Tab:

Matthews PaintManager® Color Software Beta App: 18.2002.25 / Data: 18.2003.16

Welcome, Sys Admin

Test 2:Test2

Color Description: Test 2

Color Code: Test2

Save Cancel

VOC Cost

Components Details Contact Information

PAINT LINE	AMOUNT	COMPONENT	%	GRAMS [INC.]	ORDER	DELETE
N	0.19 qt	N911 VIOLET	63.0	113.0	▲ ▼	✖
		N931 TRANS RED	26.4	52.0	▲ ▼	✖
		N929 CARBON BLACK	7.2	13.0	▲ ▼	✖
		N923 BLACK	3.3	6.0	▲ ▼	✖

Filter Components: Select components to add

42208 GLOSS CLEAR 42228 SATIN CLEAR 287112 SUEDE ADDITIVE MEDIUM

287113 SUEDE ADDITIVE 287190 CRIMSON PEARL 287192 OPAL BLUE PEARL

287193 GOLD DUST PEARL 287195 FROST WHITE PEARL 287196 RUSSET PEARL

287197 COPPER PEARL 287750 EXEMPT FLATTENING DX41 FLAMBOYANCE WHITE

FACTORY PACK FACTORY PACK N202 WHITE N911 VIOLET

To Formula and Mixing

1. **Color Description:** Required

2. **Color Code:** Required

3. **Save**

4. **Cancel**

5. **VOC**

6. **Cost**

Price Code

Cost

Price

7. **Tools Menu:** Delete custom formula

8. **Filtered Search**

9. **Change Toner Amount**

10. **Order:** Move Toner in List

11. **Delete Toner**

12. **To Formula and Mixing:** To mix the formula on the scale.

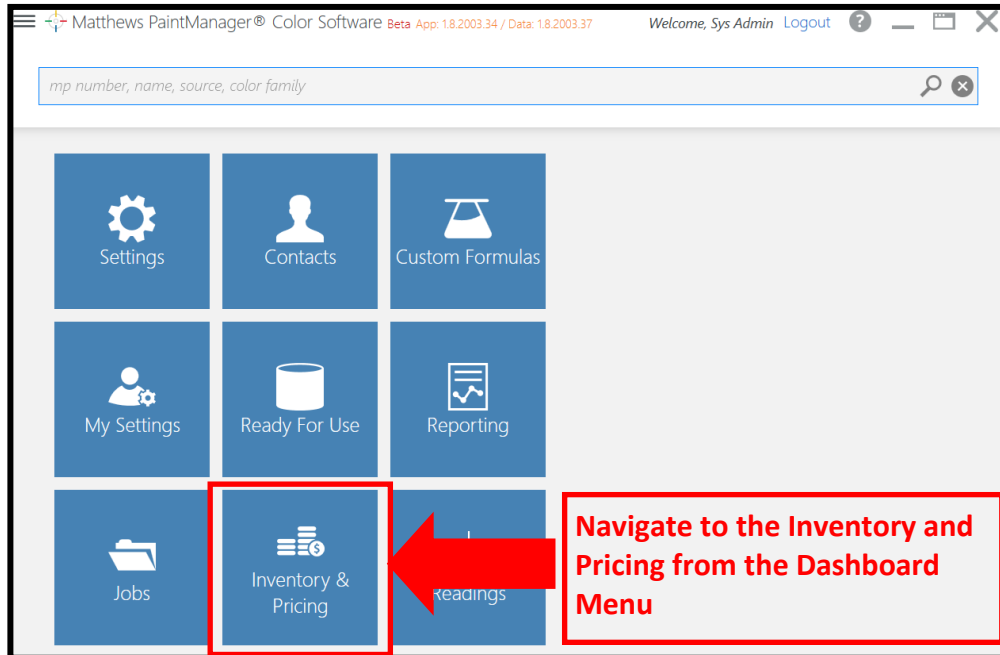
## Details Tab:

In the event a custom formula was entered from scratch, you can make entries here as needed to help with future searches, pricing, and reference information.

Custom formulas created from an existing code will automatically populate these entries.

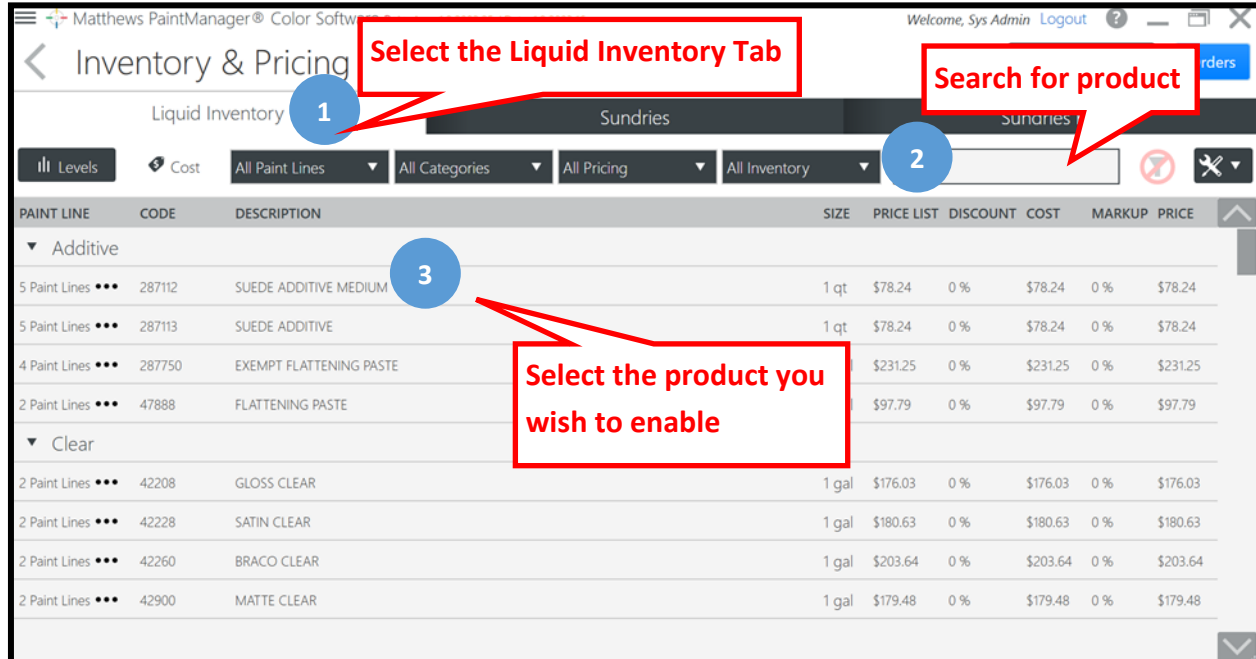


# Section 11: Sundries and Sundry Kits



## Enable a Matthews Product for Sundry Use:

To be able to add a product as a sundry, you must enable it.



Continued on next page.

Matthews PaintManager® Color Software Beta App: 18.2002.25 / Data: 18.2003.16

Welcome, Sys Admin Logout

## Inventory & Pricing

### 287112 : SUEDE ADDITIVE MEDIUM

PAINT LINES

5 Paint Lines **1.00 Quarts**

CATEGORY	SUBCATEGORY	UNITS PER CARTON	REORDER AMOUNT
Liquid	Additive	6 x 1.00 qt	0.00

PRICE LIST	DISCOUNT	COST	UNIT COST
\$78.24	0 %	\$78.24	\$78.24/qt
MARKUP	PRICE	UNIT PRICE	
0 %	\$78.24	\$78.24/qt	

SKU: 287112SP/04

On Order: 0.00

PRODUCT IN USE:  **Default**

PRICING CALCULATION: **Default**

CAN ADD TO SUNDRY KIT:

MINIMUM AMOUNT: 0.00

AMOUNT ON HAND: 0.00

5 Save Changes

4 Check to enable

## Create a non-Matthews Sundry:

Matthews PaintManager® Color Software Beta App: 18.2002.25 / Data: 18.2003.16

Welcome, Sys Admin Logout

## Inventory & Pricing

Liquid Inventory **Sundries**

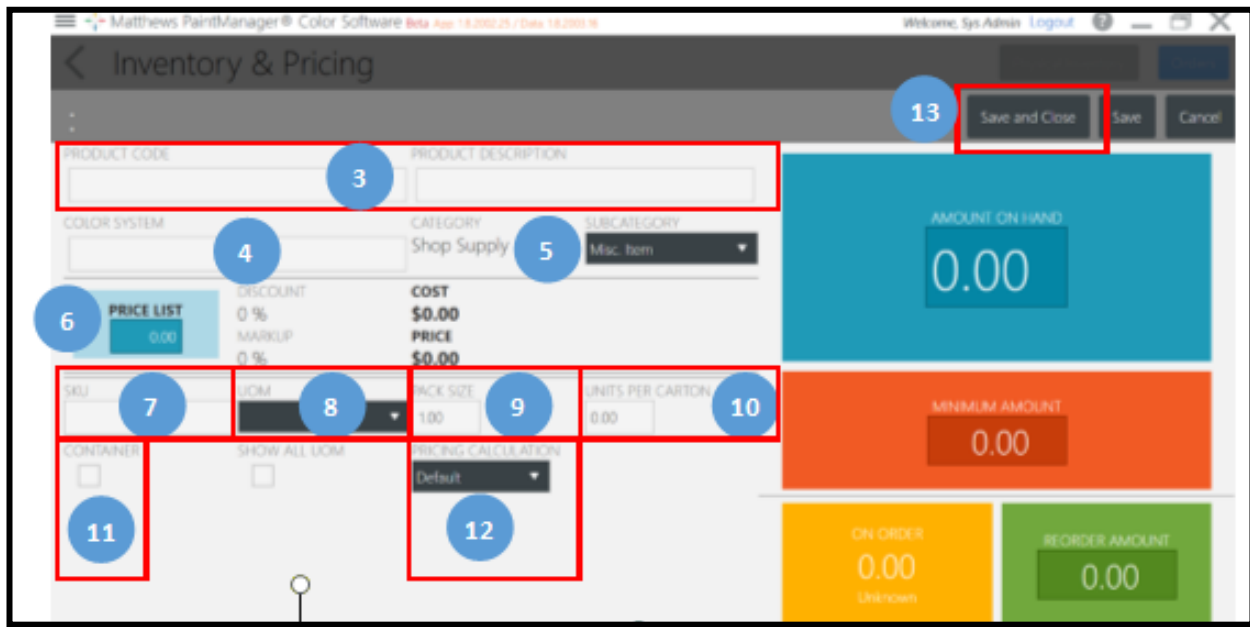
Levels Cost All Manufacturers All Categories All Pricing Product code search

COLOR SYSTEM	CODE	DESCRIPTION	SIZE	PRICE LIST	DISCOUNT	COST	MA
▼ Additive	287112	SUEDE ADDITIVE MEDIUM	1 qt	\$78.24	0 %	\$78.24	
▼ Paint Can	CAN/01	Paint Can, 1 Gallon	1 ea	\$0.00	0 %	\$0.00	

Tools Menu: Manage Pricing, Manage Levels, **+ Sundry**, Delete Sundries

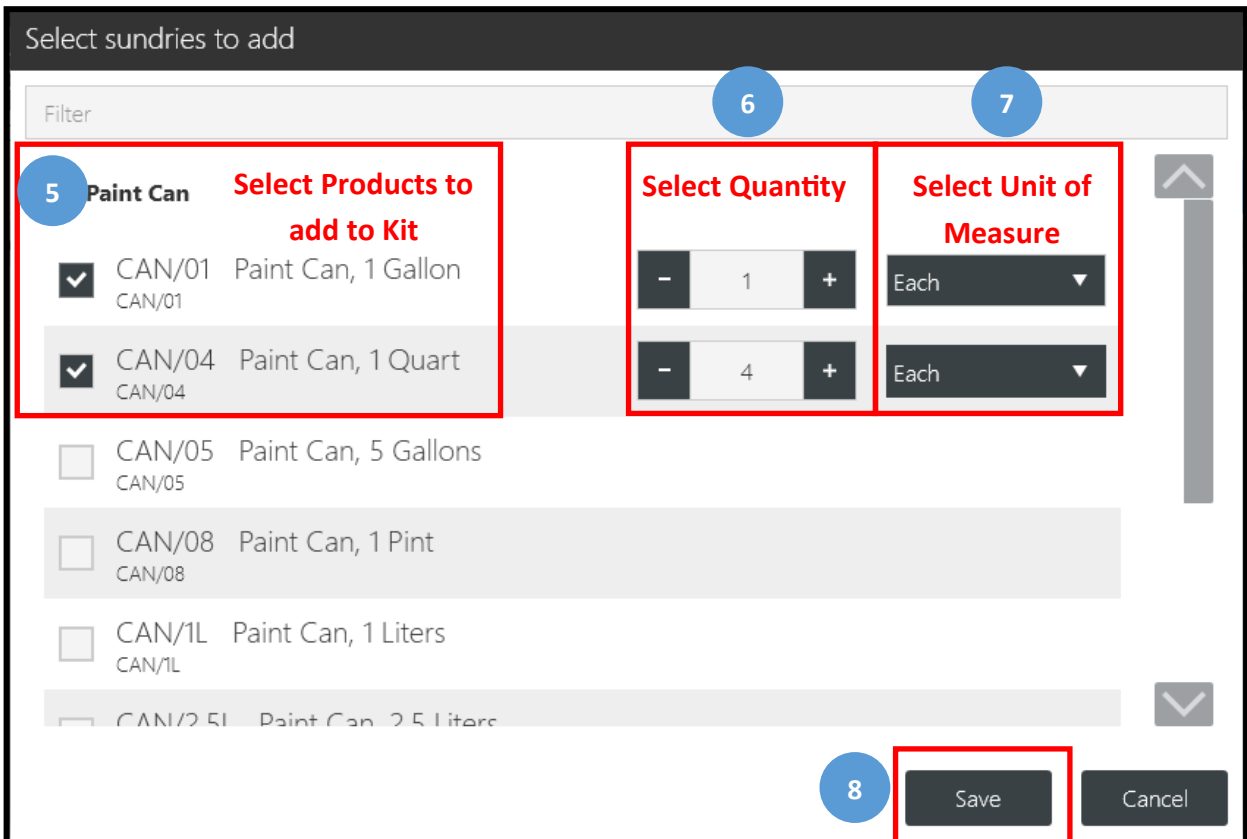
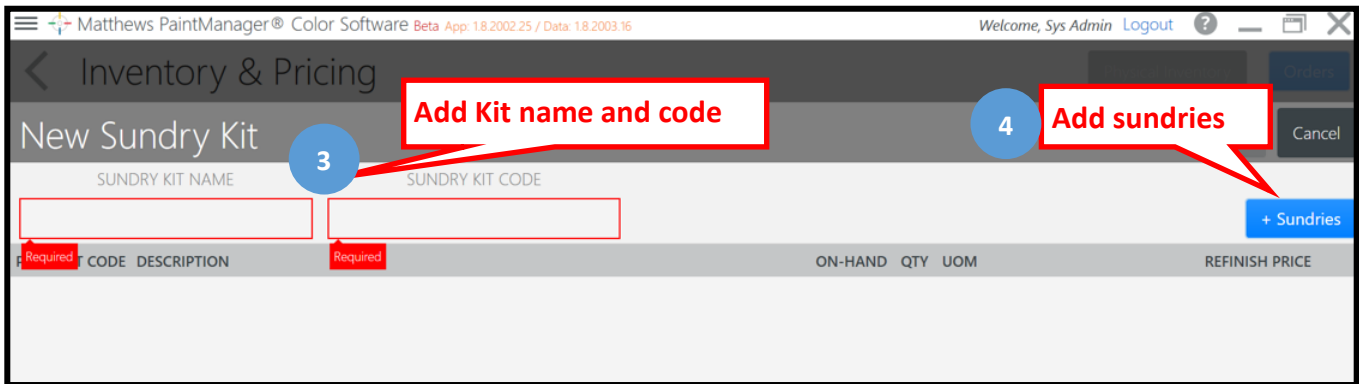
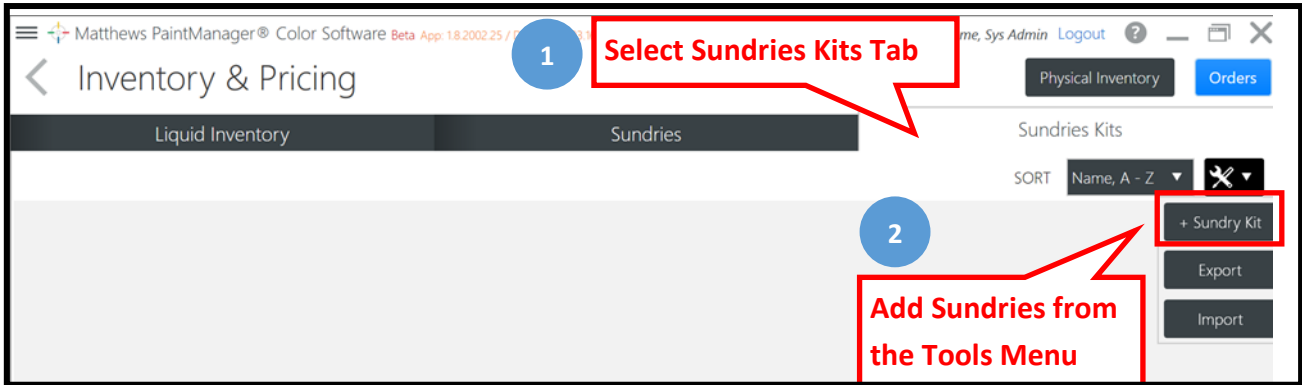
1 Select Sundries Tab

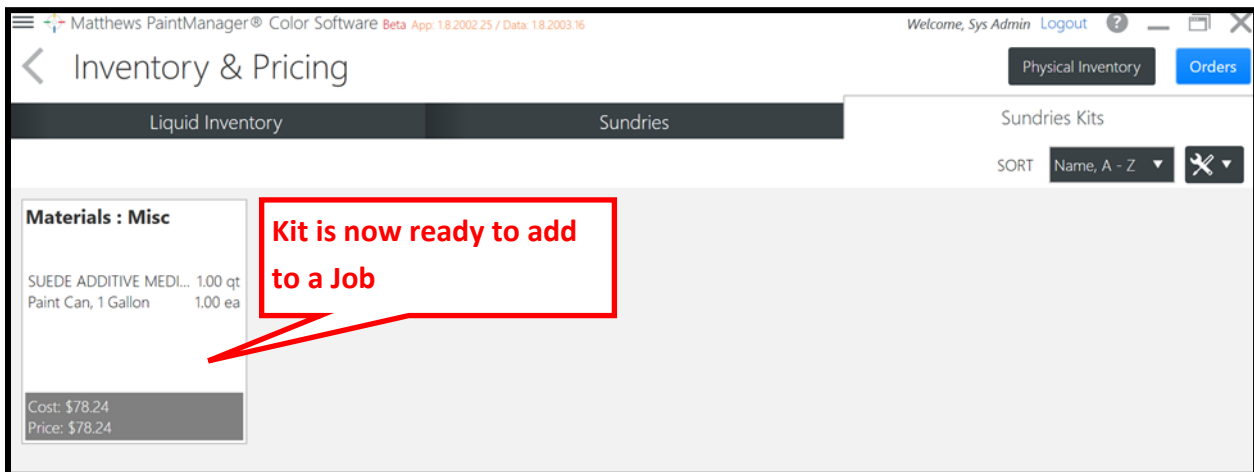
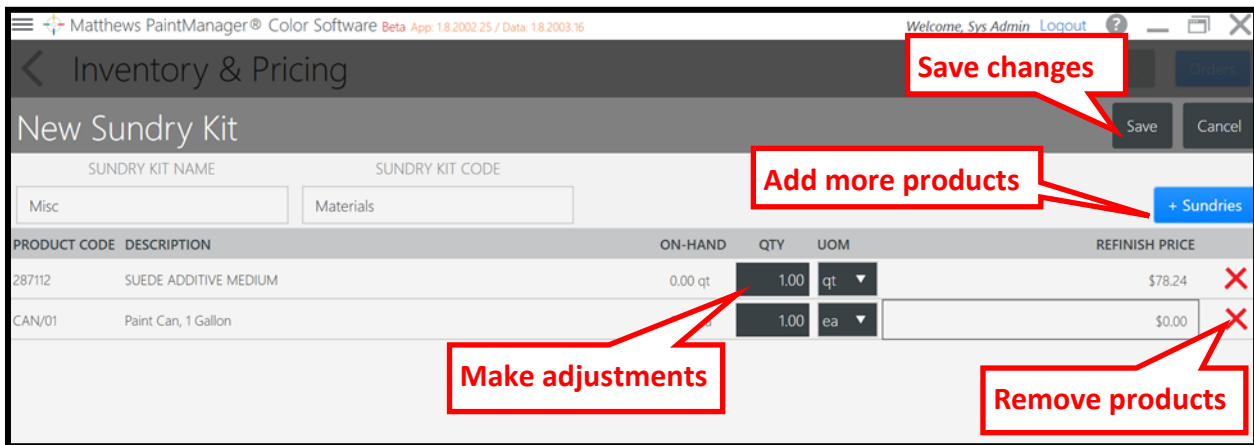
2 Select Tools Menu



1. **Sundries Tab**
2. **Tools Menu:** Select +Sundry
3. **Product Information**
4. **Manufacturer:** Used for filtering on the Sundries tab.
5. **Subcategory:** If you are adding a container you want to be used with the Can Management function you must select "Paint Can" and item 11 will automatically be selected. Can Management provides suggested container size for mixing and adds cost to Jobs.
6. **Price List:** This is the cost the customer pays for the item.
7. **SKU:** Used for ordering.
8. **UOM:** Select option to match container size.
9. **Pack Size:** Quantity for selected UOM. Example: UOM is each, pack size might be 25. (25 scuff pads in a box/pack)
10. **Units Per Carton:** How many units in a carton/ case, used for inventory ordering.
11. **Container:** Is automatically checked if you select the subcategory Paint Can.
12. **Pricing Calculation:** Default pricing for all Sundries or designate a custom price or percent.
13. **Save and Close**

## Create a Sundry Kit:

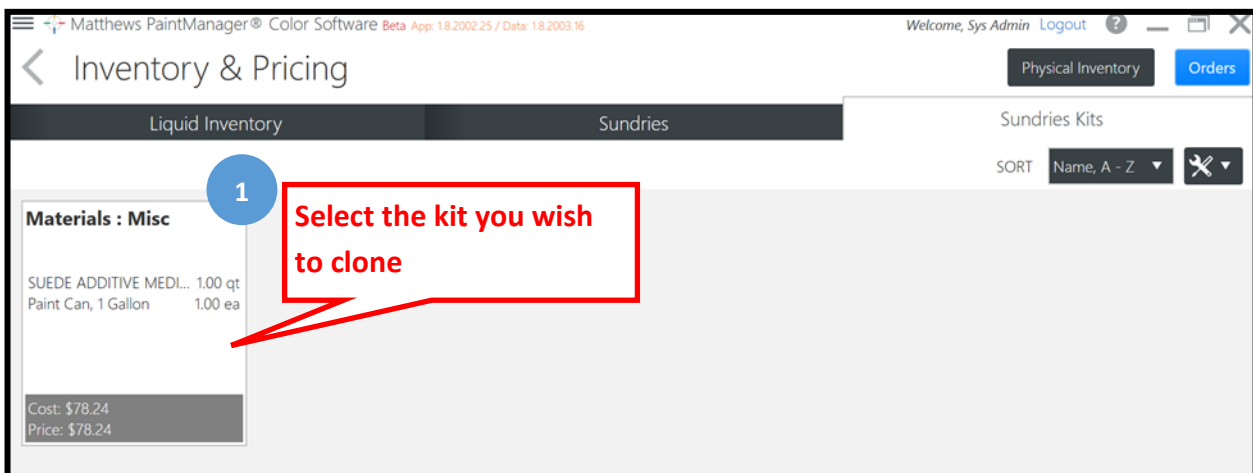


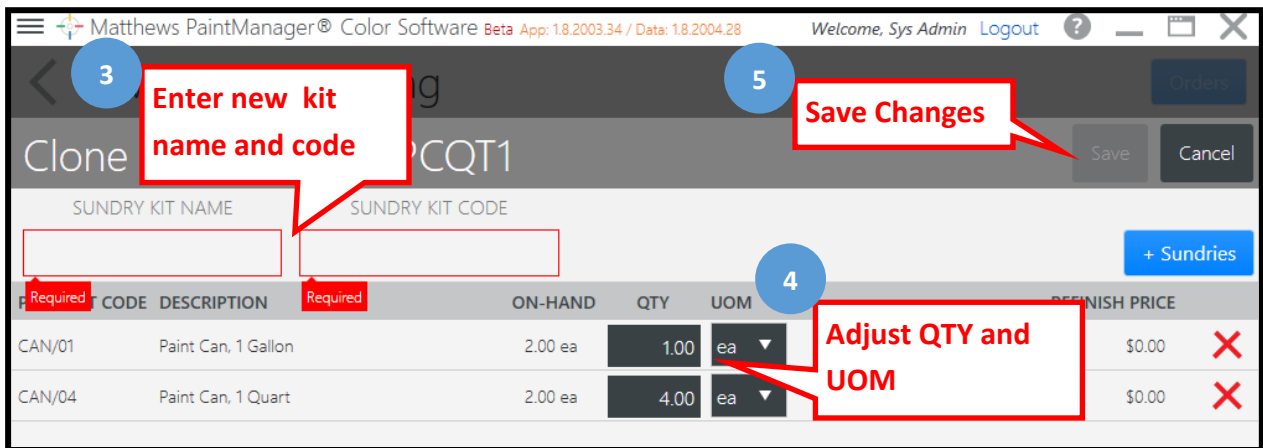
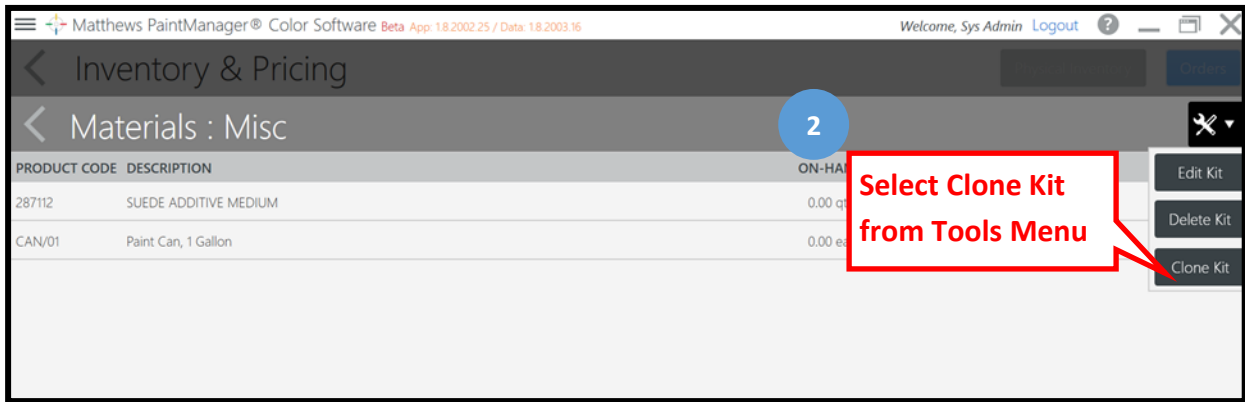


## Cloning a Kit:

Cloning a kit is a fast way to create a new kit by duplicating an existing kit, make adjustments and save as a new kit. This is ideal when you want to create kits with similar components and with different quantities.

**Example:** You want to make two kits that all contain the same but at different amounts. You can create a small and large kit quickly using cloning.





## Adding Sundries to a Job:

From the Job Sundry tab you can choose to add an individual sundry or a sundry kit.

Kit	Product Code	Product Description	Sku	Qty	Added By
	CAN/01	Paint Can, 1 Gallon	CAN/01	1.00 ea	Duane Do...

**Add a Sundry:**

- Search and filter for sundry items.
- Select individual sundries.
- Choose quantity.
- Select unit of measure.
- Save Changes.

**Adding a Sundry Kit:**

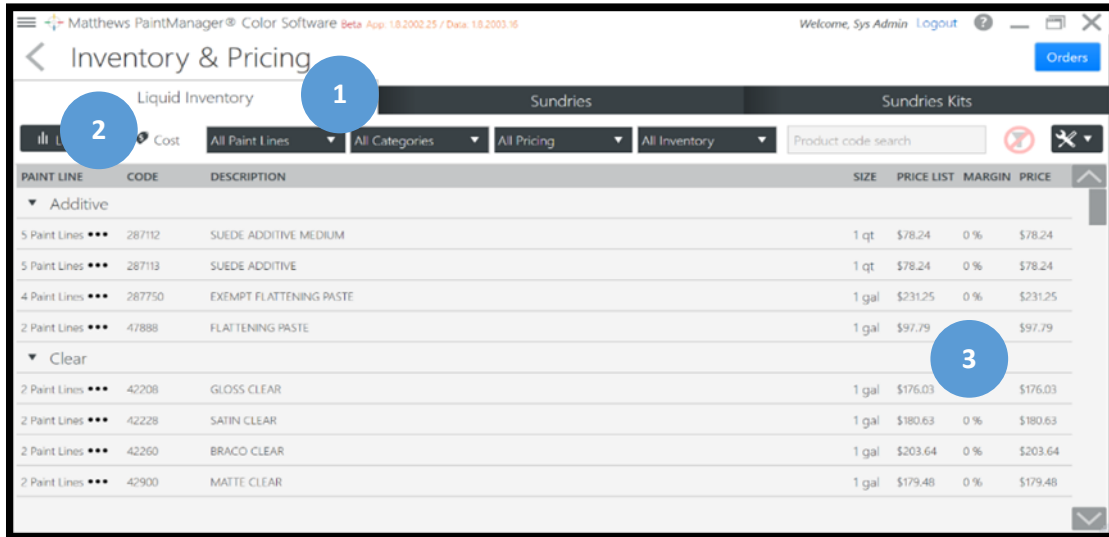
- Search and filter for a sundry kit.
- Select individual kits.
- Choose quantity.
- Save Changes.

# Section 12: Pricing and Pack Size for Job Costing

The purpose of this section is to show you how to setup pricing for costing. Inventory will only be covered for pack size because the size of container selected can have an impact on cost.

*Sundries and Sundries Kits will be discussed in Section 12*

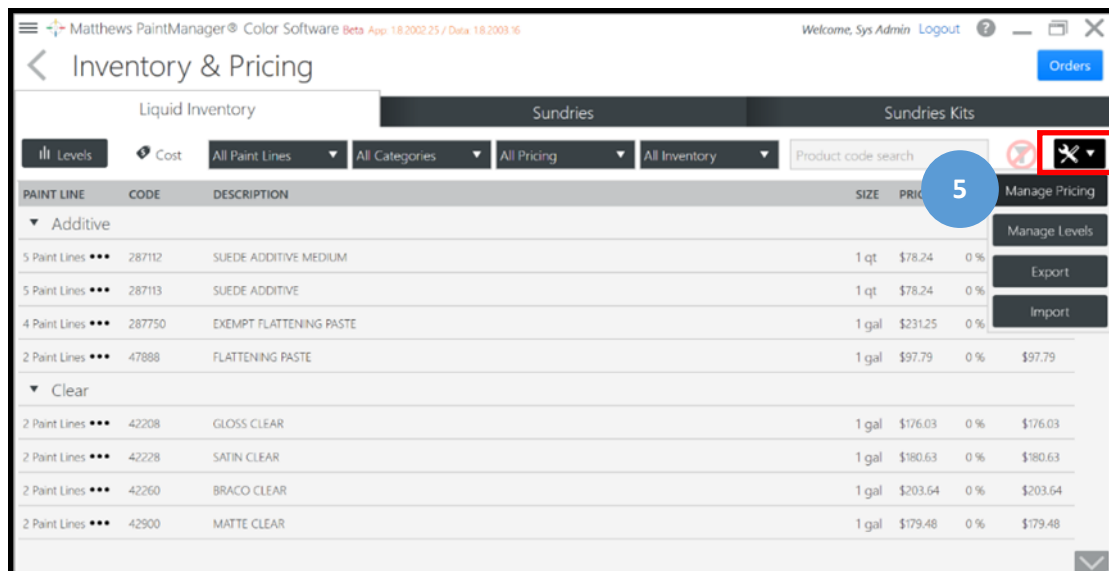
## Inventory and Pricing Main Screen:



### Liquid Inventory Tab

- 1. Cost View selection
- 2. Current Price and Pack size settings

## Manage Pricing:



- 4. Tools Menu
- 5. Manage Pricing Option

## Pricing Screen:

**Important:** Price is calculated from Cost on the Inventory & Pricing screen instead of Price List. If you enter a discount the price will be calculated from the discounted cost. This is a major departure from Legacy.

Price, cost, discount percent, and margin percent have different priorities on this screen.

- Custom product pricing and percentages cannot be overwritten by category or Liquid Default settings.
- Category percentages are not overwritten by Liquid Default settings.

The screenshot shows the 'MANAGE PRICING' interface. At the top, there are filters for 'All Paint Lines', 'All Categories', 'All Pricing', and 'All Inventory' (callout 1). A search bar for 'Product code search' is on the right (callout 2). Below the filters are buttons for 'Bulk Update' (4), 'Select All' (5), 'Clear Selection' (6), 'Reset Percent' (7), and 'Reset Price' (8), along with 'Save' and 'Cancel' buttons. The 'LIQUIDS DEFAULTS' section shows 'PRICE LIST DISCOUNT' at 0.00% (callout 10) and 'MARGIN' at 30.00% (callout 11). The main table lists products with columns for 'PAINT LINE', 'CODE', 'DESCRIPTION', 'PACK SIZE', 'PRICE LIST', 'DISCOUNT', 'COST', 'MARGIN', and 'PRICE'. The first row is 'ADDITIVE' (callout 12). The second row is highlighted in yellow and shows 'SUEDE ADDITIVE' with 'Custom Cost/Price' (callout 16) and a price of 74.42. The third row is highlighted in blue and shows 'EXEMPT FLATTENING PASTE' with 'Custom Percent' (callout 17) and a discount of 20.00%. Other rows include 'SUEDE ADDITIVE MEDIUM' and 'FLATTENING PASTE'.

### 1. Filtering Options

Filter by Paint Line, Product Category, Pricing, and Inventory

### 2. Search Bar

Use the Search bar to filter products.

### 3. Clear

Resets filtering options to default settings and clears the search field.

### 4. Bulk Update

Option to apply custom discounts and margins to multiple products.

Additional option to override custom costs and prices.

Highlights the product line blue to signify custom discount and margin.

### 5. Select All

This option will select all the inventory items to perform actions on all products.

*Example:* Reset all custom costs and prices back to default.

*Example:* Reset all custom discounts and margins back to those set for Liquid Defaults.

### 6. Clear Selection

This will deselect any products you may have selected including all.

### 7. Reset Percent

Resets custom discounts and margins for selected products back to those set for Liquid Defaults.

The 'Mass Update Inventory' dialog box shows two input fields: 'Discount' set to 10.00% and 'Margin' set to 0.00%. There is a checkbox labeled 'Override custom price' which is currently unchecked. At the bottom, there are 'Update Selected' and 'Cancel' buttons.



## 8. Reset Price

Resets custom costs and prices for selected products back to Price List with any applied discounts or margins from Liquid Defaults.

## 9. Save or Cancel

Save and exit, or Cancel and exit.

## 10. Liquid Default Price List Discount

This entry will calculate a discounted cost from Price List to be applied to all products on the list except product categories and individual products with individual settings.

## 11. Margin

This entry will apply a margin calculated from cost, which may be discounted, and apply it to all products on the list except product categories and individual products with individual settings.

**12. Product Categories:** Categories can be collapsed & expanded and a category filter can be applied.

**13. Product Category Price List Discount:** This will apply a discount calculated from Price List specific to this product category and are not over written by the Liquid Default settings.

**14. Product Category Cost Margin:** This will apply a margin calculated from the category cost which may be discounted with a category Price List Discount.

**15. Has Default:** This must be selected to add category discounts and margins.

**16. Product Custom Cost and/or Price:** (Highlights product line yellow)

Custom costs and prices are not overwritten with category or Liquid Default settings.

Custom costs and prices are not affected by software updates and must be managed manually.

Custom entries can be reset back to Category or Liquid Default by selecting them and choosing the

**Reset Price** button. (**Filter by Custom Price, select items, then Reset Price.**) or (**Choose the Select All button then Reset Price.**)

Use custom price and cost with caution as manually managing products is time consuming. Look at the next option and manage with a custom percent if possible.

**17. Product Custom Percent:** (Highlights product line blue)

Custom percentages are not overwritten with category or Liquid Default settings.

Custom percentages are not affected by software updates and must be managed manually.

Custom percentages can be reset back to Category or Liquid Default by selecting them and choosing the

**Reset Percent** button. (**To reset all custom percentages, choose Select All then Reset Percent button.**)

## Modify Pack Size for Accurate Pricing:

Selecting the pack size to match what is in the customer's inventory is important for job cost environments. Smaller containers of product cost more per ounce and may overstate cost measurements and prices for billing if the shop is using a larger container. Correct pack size ensures accurate numbers.

The screenshot shows the 'Inventory & Pricing' interface. At the top, there are tabs for 'Liquid Inventory', 'Sundries', and 'Sundries Kits'. Below these are filters for 'Levels', 'Cost', and various dropdown menus. A search bar is labeled 'Product code search'. A table lists products with columns: PAINT LINE, CODE, DESCRIPTION, SIZE, PRICE LIST, DISCOUNT, COST, MARGIN, and PRICE. The table is filtered to show 'Additive' products. A dropdown menu is open on the right, showing options: 'Manage Pricing', 'Manage Levels', 'Export', and 'Import'. Red boxes and blue circles highlight the 'Tools' icon (1), the 'Manage Levels' option (2), and the search bar (3).

PAINT LINE	CODE	DESCRIPTION	SIZE	PRICE LIST	DISCOUNT	COST	MARGIN	PRICE
▼ Additive								
5 Paint Lines	287112	SUEDE ADDITIVE MEDIUM	1 qt	\$78.24	10 %	\$70.42	0 %	\$70.42
5 Paint Lines	287113	SUEDE ADDITIVE	1 qt	\$78.24	0 %	\$78.24	0 %	\$78.24
4 Paint Lines	287750	EXEMPT FLATTENING PASTE	1 gal	\$231.25	10 %	\$208.13	0 %	\$208.13
2 Paint Lines	47888	FLATTENING PASTE	1 gal	\$97.79	10 %	\$88.01	0 %	\$88.01
▼ Clear								
2 Paint Lines	42208	GLOSS CLEAR	1 gal	\$176.03	0 %	\$176.03	30 %	\$251.47
2 Paint Lines	42228	SATIN CLEAR	1 gal	\$180.63	0 %	\$180.63	30 %	\$258.04

## Manage Levels Screen:

The screenshot shows the 'MANAGE LEVELS' screen. At the top, there are filters for 'All Paint Lines', 'All Categories', 'All Minimums', and 'All Inventory'. A search bar contains the number '287'. Below the filters are buttons for 'Select All', 'Clear Selection', 'Not Used', 'Used', 'Save', and 'Cancel'. A table lists products with columns: USED, CODE, DESCRIPTION, SKU, PACK SIZE, QTY, MIN, REORDER, and ADD TO CART. The table is filtered to show 'Additive' products. A dropdown menu is open on the right, showing options: '1 Quarts', '1 Gallons', and '5 Gallons'. Red boxes and blue circles highlight the search bar (3), the 'Manage Levels' option (4), and the '1 Quarts' pack size (5).

USED	CODE	DESCRIPTION	SKU	PACK SIZE	QTY	MIN	REORDER	ADD TO CART
▼ Additive								
✓	287112	SUEDE ADDITIVE MEDIUM	287112SP/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	287113	SUEDE ADDITIVE	287113SP/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	287750	EXEMPT FLATTENING PASTE	287750SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>

1. Select the Tools Menu
2. Select manage Levels
3. Enter filtered Search criteria in the Search bar.
4. Products with dropdown lists offer multiple pack sizes for selection.
5. The current selected Pack Size for this product.

## Select Container (Pack) Size:

Matthews PaintManager® Color Software Beta App: 1.8.2008.38 / Data: 1.8.2009.14 Welcome, Sys Admin Logout

MANAGE LEVELS All Paint Lines All Categories All Minimums All Inventory Product code search

Select All Clear Selection Not Used Used Save Cancel

USED	CODE	DESCRIPTION	SKU	PACK SIZE	QTY	MIN	REORDER	ADD TO CART
▼ Binder								
✓	283320SP	SATIN VOC CATALYST	283320SP/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	283800SP	VOC MAP CATALYST	283800SP/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	43270SP	UNIVERSAL CATALYST	43270SP/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	43621SP	BRUSHING CATALYST	43270SP/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	43999SP	SLOW CATALYST	43270SP/01	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	6278SP	HIGH PERFORMANCE CATAL...	6278SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✓	74735SP	ACTIVATOR	74735SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✓	74766SP	PT ACTIVATOR	74766SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✓	74781SP	HBEF ACTIVATOR	74781SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✓	MAP-LVX101	EPOXY HARDENER	MAP-LVX101/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	MAP-LVX270	MAP-LV CATALYST	MAP-LVX270/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
▼ Cleaner								

6. Select the product dropdown menu.
7. Choose the desired pack size.
8. Save when you are finished making your selections.

# Section 13: Basic Inventory for Ordering and Receiving

## Introduction

- This Section covers basic inventory which is recommended to manage liquid inventory with limited use of sundry items. Managing large number of sundries requires extensive manual entry and on-going manual price management.

## Benefits

- Using the Ordering and Receiving function requires maintaining an accurate inventory count which in turn will provide an accurate inventory valuation. This valuation would be available for facilities that require it.
- As product is poured on the scale it is deducted from inventory and reordering is triggered automatically.

## Challenges

- All product must be weighed on the scale to ensure accurate use for reordering. If product is not mixed on the scale, reordering will not be triggered accurately and you may run out of product before it is reordered.
- Orders must be generated and must also be received accurately to maintain integrity with the process.
- Inventory counts will be needed periodically to ensure the actual inventory amounts agree with those in the software.

# Inventory & Pricing Main Screen

PAINT LINE	CODE	DESCRIPTION	SIZE	QTY	MIN	REORD
▼ Additive						
5 Paint Lines ●●●	287112	SUEDE ADDITIVE MEDIUM	1 qt	0.00	0.00	0.00
5 Paint Lines ●●●	287113	SUEDE ADDITIVE	1 qt	0.00	0.00	0.00
4 Paint Lines ●●●	287750	EXEMPT FLATTENING PASTE	1 gal	0.00	0.00	0.00
2 Paint Lines ●●●	47888	FLATTENING PASTE	1 gal	0.00	0.00	0.00
▼ Clear						
2 Paint Lines ●●●	42208	GLOSS CLEAR	1 gal	0.00	0.00	0.00
2 Paint Lines ●●●	42228	SATIN CLEAR	1 gal	0.00	0.00	0.00
2 Paint Lines ●●●	42260	BRACO CLEAR	1 gal	0.00	0.00	0.00
2 Paint Lines ●●●	42900	MATTE CLEAR	1 gal	0.00	0.00	0.00

## 1. Liquid Inventory Tab

## 2. Levels View

Current view used to display inventory levels and ordering information.

## 3. Cost View

## 4. Filters for Product

Paint Line and Product Category filters.

## 5. Filter for Minimums

Filter list for all products with minimum quantity entries.

Filter list for products where minimums are at or below minimum.

## 6. Filter for Used/Not Used Inventory:

Selecting only the inventory items used in the facility helps to manage a much shorter list.

## 7. Search & Filter

As you type a product number the list will begin to filter.

## 8. Cancel all Filters & Searches

## 9. Collapsed Product Category

## 10. Expanded Product Category

## 11. Tools Menu Manage Pricing

## 12. Tools Menu Manage Levels

Used to establish inventory ordering parameters.

## 13. Tools Menu Export/Import

Ability to export Inventory and Pricing setting for editing and importing into another install.

# Managing Product Levels

Filters: Reviewed on previous section.

MANAGE LEVELS 1 All Paint Lines All Categories All Minimums All Inventory Product code search 2

3 Select All 4 Clear Selection 5 Not Used 6 Used Save Cancel

USED	CODE	DESCRIPTION	SKU	PACK SIZE	QTY	MIN	REORDER	ADD TO CART
✓	287112	SUEDE ADDITIVE MEDIUM	287112SP/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	287113	Marked as Used	287113SP/04	1 Quarts	0.00	0.00	0.00	<input type="checkbox"/>
✓	287750	EXEMPT FLATTENING PASTE	287750SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✓	47888	FLATTENING PASTE	47888SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✓	491	CLEAR MATTE	491/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✓	42208	GLOSS CLEAR	42208SP/01	1 Gallons	-0.01	0.00	0.00	<input type="checkbox"/>
✓	42228	SATIN CLEAR	42228SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✗	42260	BRACO CLEAR	42260SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>
✗	42900	Marked as Unused	2900SP/01	1 Gallons	0.00	0.00	0.00	<input type="checkbox"/>

10 11 12

## 1. Filtered Search

## 2. Select All

This will select all products on the inventory list.

Effective tool when used with the “Not Used” and “Used” button explained above.

## 3. Clear Selection

Select an individual product once and it becomes selected, twice it becomes unselected.

Multiple items can be selected individually or with the Select All button.

This button can be used to clear the selection of multiple items.

## 4. Not Used Button

## 5. Used Button

## 6. Used Designation

Items with a green check mark are selected and those with a red X are not.

## 7. Pack Size Selection

Pack size options are available only if there is a dropdown list present.

Pack size is important for pricing as larger pack sizes cost less per amount used.

Pack size for inventory is important to calculate usage and reordering correctly.

## 8. Add To Cart

Items can be selected here to be added to an order.

## 9. Quantity on Hand

This represents the amount of product currently in stock.

As product is weighed on the scale the amount poured is deducted from this amount.

This can be roughly calculated by picking up each can and entering an approximate volume.

The “Inventory Current Status” report can be used to document this process.

## 10. Minimum Quantity

Once the quantity on hand is diminished to this quantity, the program will trigger an order for this product.

## 11. Reorder Quantity

The program recommends ordering this amount when the quantity on hand reaches the minimum quantity.

## Tips for Limiting the Inventory List to Products Used in a Facility

When you are managing inventory for ordering and receiving, it is a good practice to be able to show only the products being used in the facility on this screen. This is done by marking items as either “Used” or “Not Used”, then filtering the screen for the “Used” items.

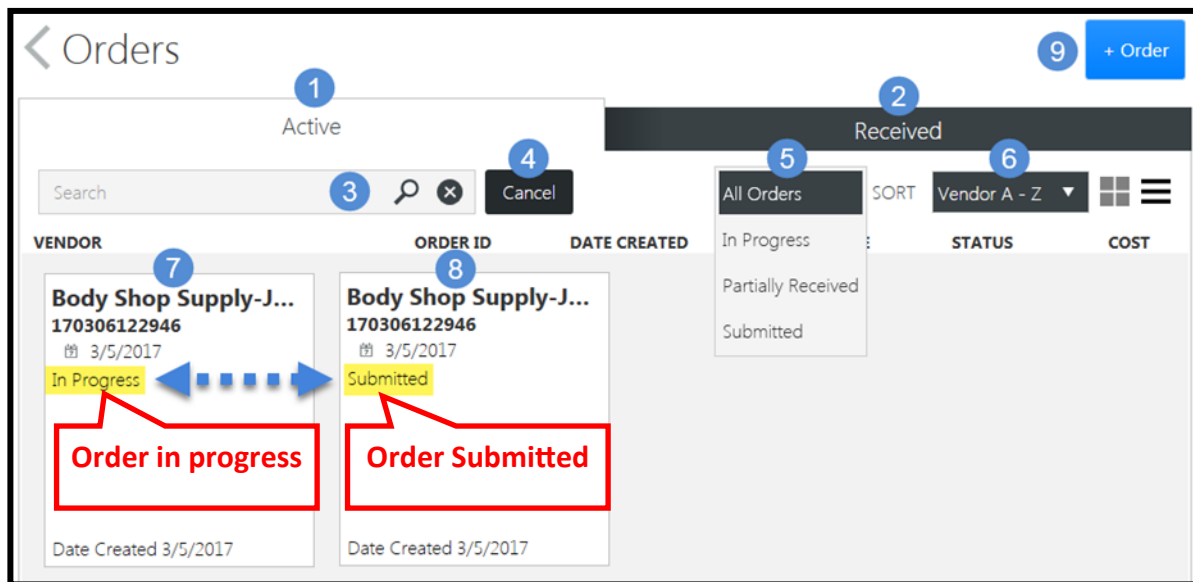
Here is a procedure to follow to make this easier:

- Choose the “Select All” button.
- Select the “Not Used” button to mark all products with a red X in the “Used” column.
- Filter the list by product category and begin selecting the products used in the facility in each category.
- As you select each product make sure to choose the correct pack size.
- When you are finished you can use the filter to view “Used Inventory”.
- Now you are ready to establish quantity on hand, minimum reorder point, and reorder quantity for each item.

## Managing Orders

To manage orders select the Orders button on the Inventory and Pricing screen.

Orders



- 1. Active Tab:** Contains all orders in process that have not been received.
  - In Progress Orders:** Orders started but not submitted or sent to the vendor for fulfillment.
  - Partially Received Orders:** Orders with some items not received.
  - Submitted Orders:** Orders sent to the vendor for fulfillment.
- 2. Received Tab:** Contains all orders received.
- 3. Search:** Search for an order.
- 4. Cancel:** Cancel search
- 5. Order Status Filter:** Filter by order status.
- 6. Sort Options**
- 7. In Progress Order**
- 8. Submitted Order**
- 9. Create New Order:** Select to start a new order.

## Creating a New Order

Matthews PaintManager® Color Software Beta App: 1.8.2003.34 / Data: 1.8.2004.30 Welcome, Sys Admin Logout

### Orders

1 + Order

#### Create Order

Order Id: 200416071817 (2)

Required Date: 4/16/2020 (3)

Urgent:  (4)

Description: (Optional)

Special Instructions: (Optional)

New Vendor Existing Vendor (6)

Contact Name (Required)

First Name:  Last Name:

Company Name:

Save Cancel (7)

System Generated Number

Select New or Existing Vendor

Check box if this is an urgent order

## Add Items to the Order

Matthews PaintManager® Color Software Beta App: 1.8.2002.25 / Data: 1.8.2003.16 Welcome, Sys Admin Logout

### Orders

#### Edit Order

ORDER ID: 200312072852

REQUIRED DATE: 3/12/2020

DESCRIPTION:

SPECIAL INSTRUCTIONS:

URGENT:

Existing Contact

Search existing contacts

Contact Name: John Company: Johnson Supplies

PRODUCT CODE	DESCRIPTION	COLOR SYSTEM	SKU	PACK SIZE	UOM	ORDERED
						1 Add From Cart
						2 Add Minimum
						3 Add Inventory
						4 Add Sundry

- Add from Cart:** Automatically adds items with “Add to Cart” selection.
- Add Minimum:** Automatically adds reorder amounts for all items below the minimum.
- Add Inventory:** Manually select items from the Liquid Inventory Tab.
- Add Sundry:** Manually select items from the Sundries Tab.



## Add Items from Suggested Minimums

- Reorder Quantity:** Reorder quantity entered for this product on the Manage Levels screen.
- Change Pack Size:** Option to change pack size.
- Delete:** Option to remove item from this suggested order.

## Add Items from Inventory

- Category Filter:** Filter the list for easier selection.
- Filtered Search:** List filters as you start typing.
- Select Products:** Select all or select individually.
- Choose Quantity**

## Add Items from Sundries

- Category Filter:** Filter the list for easier selection.
- Filtered Search:** List filters as you start typing.
- Select Products:** Select all or select individually.
- Choose Quantity**

## Submit Orders

The screenshot displays the Matthews PaintManager app interface. At the top, it shows the app name and version: "Matthews PaintManager® Color Software Beta App: 1.8.2002.25". The main screen is titled "Orders" and shows a list of orders. The selected order is "200312072852 : Johnson Supplies". The order details include:

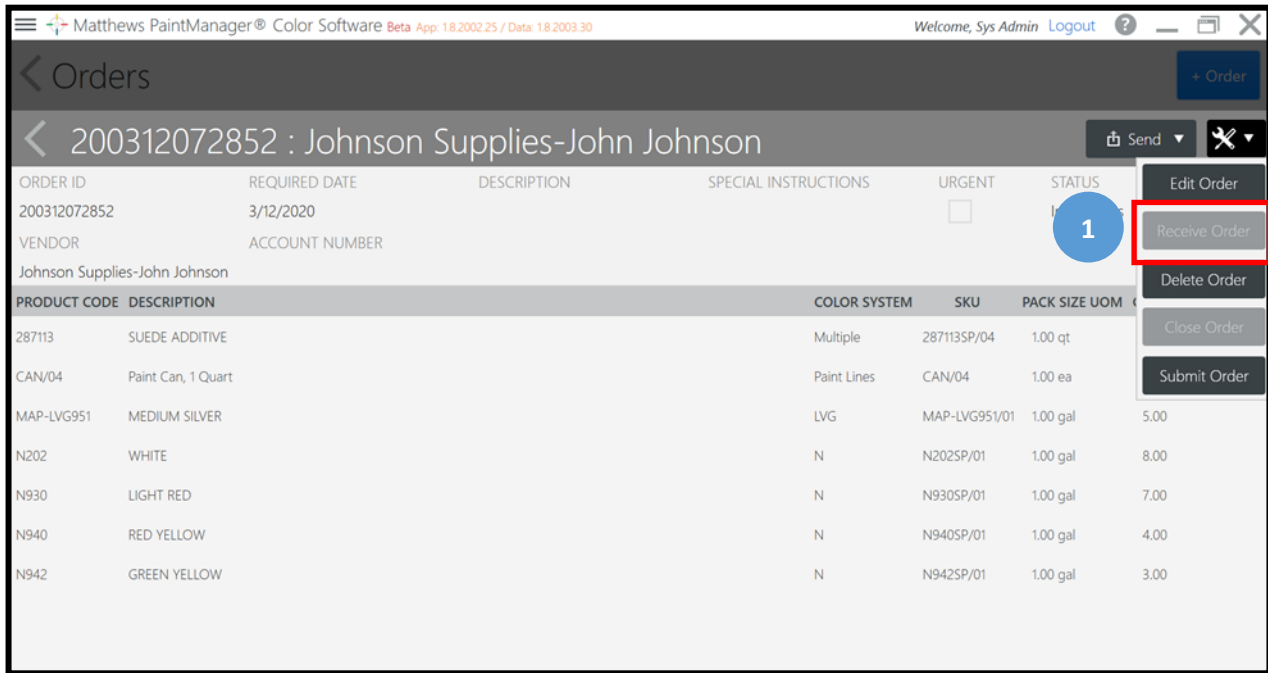
ORDER ID	REQUIRED DATE	DESCRIPTION	SPECIAL INSTRUCTIONS	CURRENT STATUS		
200312072852	3/12/2020					
VENDOR		Johnson Supplies-John Johnson				
ACCOUNT						
PRODUCT CODE	DESCRIPTION	ITEM	SKU	PACK SIZE	UOM	PRICE
287113	SUEDE ADDITIVE	ble	287113SP/04	1.00	qt	
CAN/04	Paint Can, 1 Quart	Lines	CAN/04	1.00	ea	
MAP-LVG951	MEDIUM SILVER		MAP-LVG951/01	1.00	gal	5.00
N202	WHITE		N202SP/01	1.00	gal	
N930	LIGHT RED		N930SP/01	1.00	gal	
N940	RED YELLOW					
N942	GREEN YELLOW					

Callouts and actions:

- Print:** Print to the printer selected in Print Settings.
- Email:** An order cannot be emailed until it is submitted. The vendor must have an email account listed in Contacts. An email client must be loaded on the paint computer.
- Edit Order:** The order can be edited until it submitted.
- Receive Order:** The order can be received once it is submitted.
- Delete Order:** The order can be deleted until it is submitted then this option is not available.
- Close Order:** An order can be closed if it is submitted but cannot be closed once received.
- Submit Order:** Once an order is saved with the product added, it can be submitted and emailed.

# Receive Orders

Once an order has been submitted it can be received

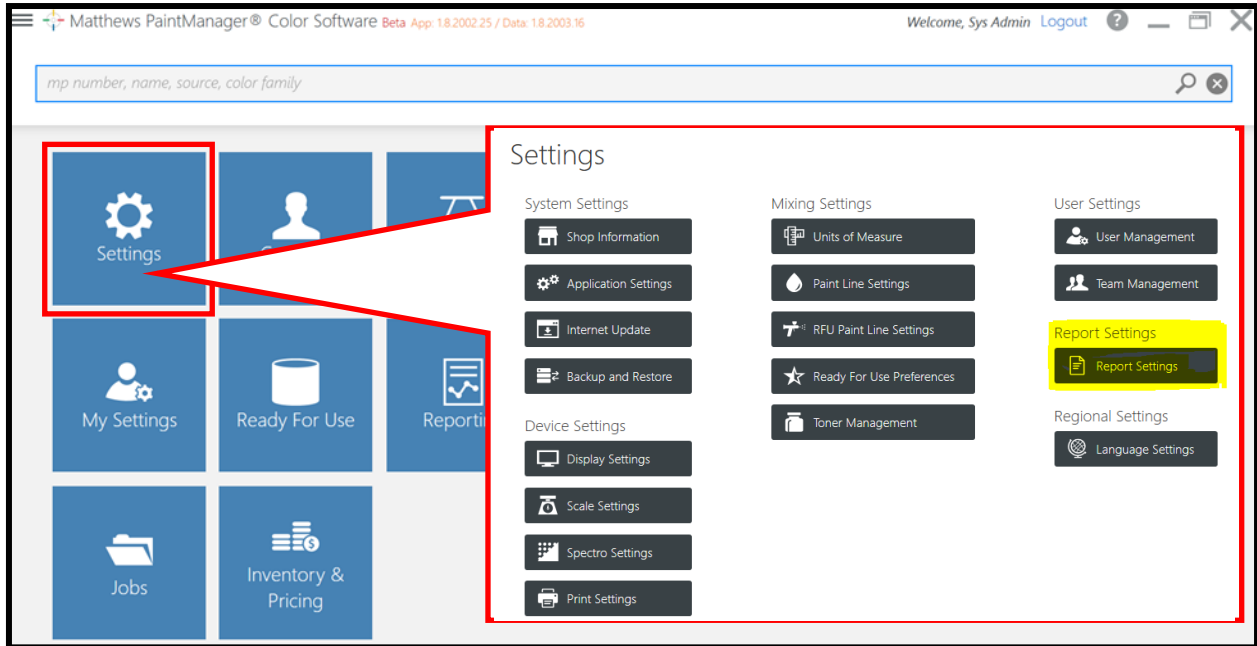


1. **Tools Menu:** Option to receive all products if they were all delivered.
2. **Receive Individual Items:** Individual items can be received.
  - If all the items on the order are not received, when saved the order will have a status of “Partially Received” and will remain on the Active Tab until all the remaining items are received.

# Section 14: Reporting

## Program Access Settings for Reports:

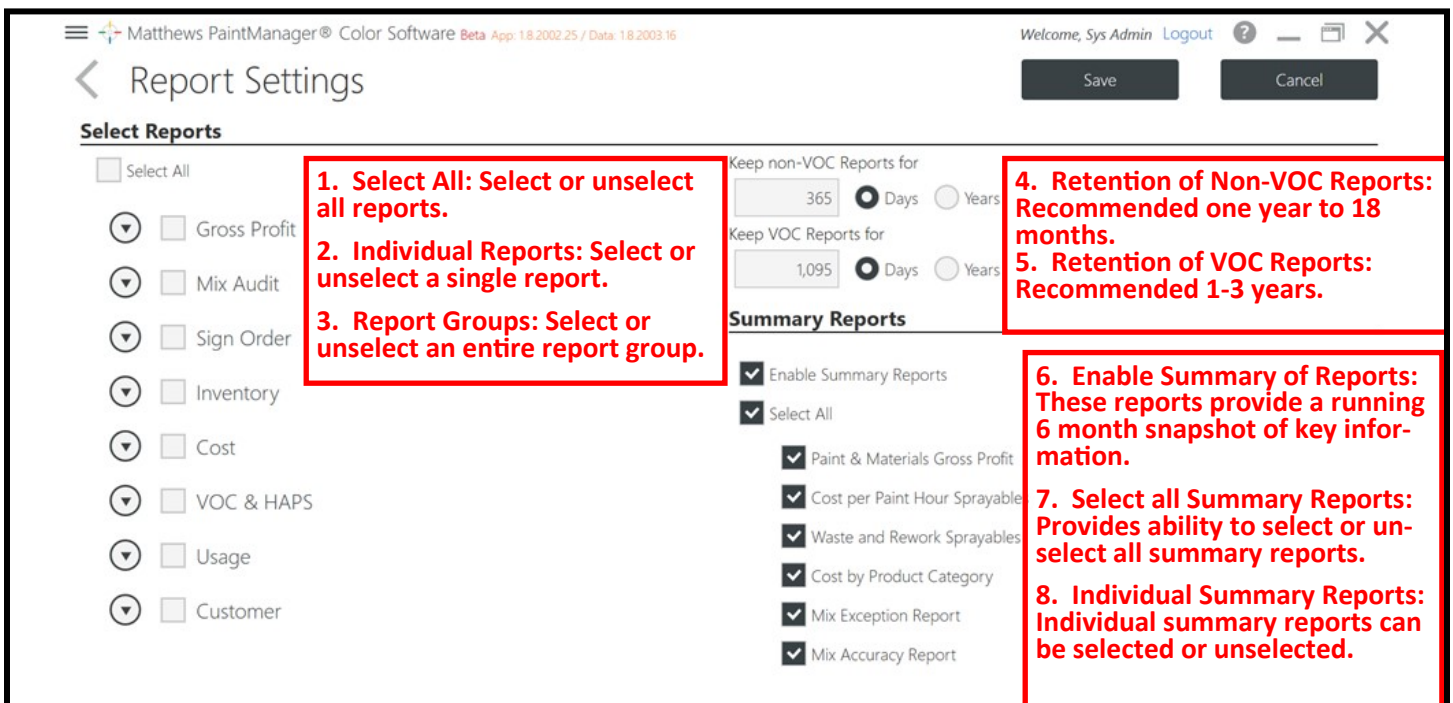
Reporting resides inside the *Matthews PaintManager* software and is enabled by navigating from the Dashboard to Settings then Report Settings.



From here you can choose the reports to be available for your installation.

Reporting now provides the ability, not only to print, but also to store generated reports. With this new ability, reports can also be scheduled to run automatically.

- Reports are stored in a standard PDF format and can be quickly and easily retrieved when needed.



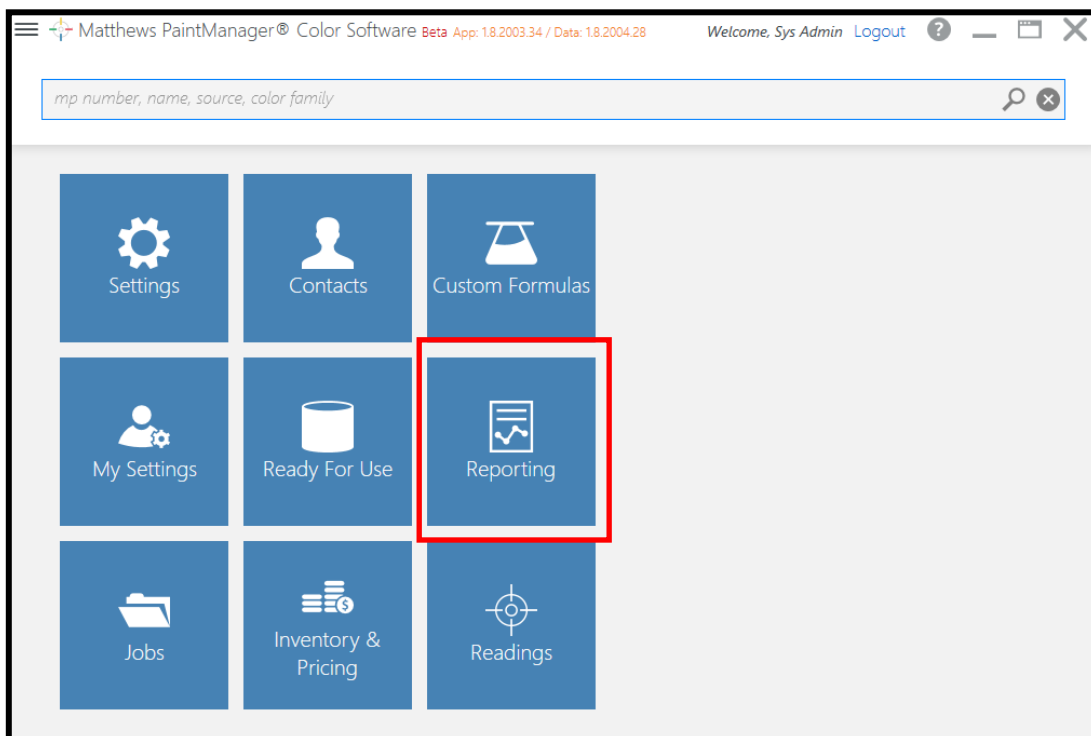
## User Access Settings for Reports

Access to reports can also be configured for an individual user. Navigate to Settings, User Management, and select Edit for a user to configure their report access.

The screenshot shows the 'User Access Settings for Reports' configuration interface. On the left, there are fields for 'User' (Painter), 'User Name' (Painter1), 'Password', 'Language' (English), and 'Expiration Date'. On the right, there is a 'Presets' dropdown menu set to 'Painter\*' and an 'Is Administrator?' checkbox. Below these are several sections of permissions: 'Jobs Management' (Jobs Management, View Customer List, Manage Customer List, Manage Teams, Modify Closed Jobs), 'Application Settings' (Manage Users & Settings, Software Updates, Applications Settings), and 'Reports' (Create Reports, Run Reports, View Reports). The 'Reports' section is highlighted with a yellow box and numbered steps: 1. Create Reports (Create new reports), 2. Run Reports (Print and save reports), and 3. View Reports (View a report print preview). At the bottom, there are 'Save' and 'Cancel' buttons.

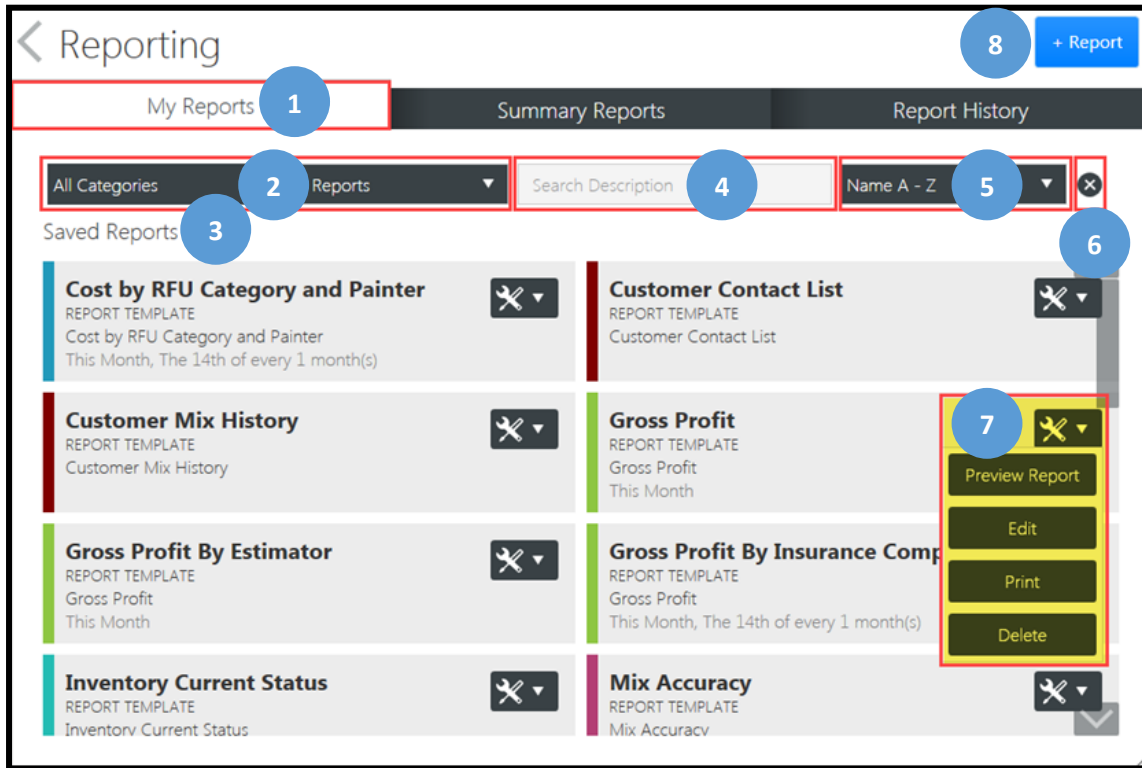
## The Reporting Main Screen

Select Reporting from the Dashboard.



This screen is composed of three main tabs:

- My Reports Tab:** Lists the report templates that store criteria for generating reports.
- Summary Reports Tab:** Contains the summary reports selected in Report Settings.
- Report History Tab:** Lists all the generated reports that were saved.

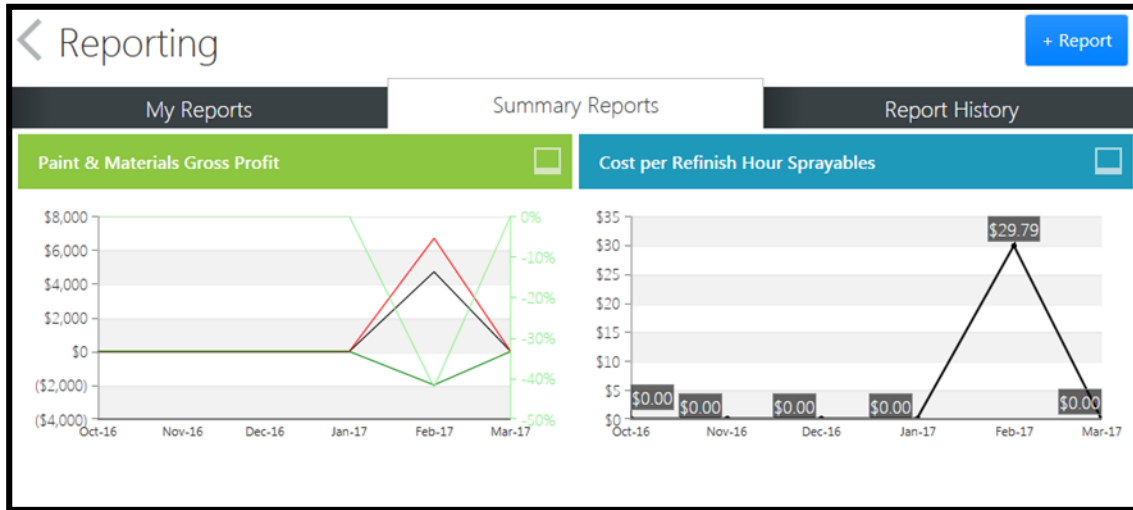


## My Reports Tab

1. **My Report Tab:** The default tab when this screen is first selected.
2. **Filter Options:** Filter by report category and/or report name.
3. **Saved Reports:** All the saved report templates.  
Templates contain saved time and data criteria used to generate the report.
4. **Search Filter:** The list will begin to filter as you type.
5. **Sort Options**
6. **Cancel:** Clears all filter, search, and sort selections and restores them to defaults.
7. **Template Tools Menu**
  - Preview a report**
  - Edit:** Change time and data criteria.
  - Print**
  - Delete**
8. **Create New Report**

## Summary Reports Tab

Summary reports display a running six month measurement for the selected summary reports.



## Report History Tab

This tab stores all reports that have been generated and saved.

- Automatically groups reports by report category.
- Each report category is represented by a unique color.
- System Generated reports are reports that were scheduled to run at a specific time.

The screenshot shows the 'Report History' tab with various UI elements highlighted by numbered callouts (1-8). The table below lists the reports shown in the interface.

REPORT DESCRIPTION	REPORT TYPE	TIME PERIOD	DATE CREATED	CREATOR
<b>COST</b>				
Repair Order Cost Per Refinish Hour	Repair Order Cost Per...	N/A	2/17/2017 9:14 AM	Admin
Shop Cost Per Refinish Hour	Shop Cost Per Refinis...	2/1/2017 12:00 AM to 2/28/2017 11:59...	2/15/2017 1:00 PM	System Generated
Cost by RFU Category and Painter	Cost by RFU Category...	2/1/2017 12:00 AM to 2/28/2017 11:59...	2/14/2017 9:00 AM	System Generated
<b>GROSS PROFIT</b>				
Gross Profit	Gross Profit	2/1/2017 12:00 AM to 2/28/2017 11:59...	2/17/2017 8:59 AM	Admin
Gross Profit By Insurance Company	Gross Profit	2/1/2017 12:00 AM to 2/28/2017 11:59...	2/14/2017 9:00 AM	System Generated
<b>MIX AUDIT</b>				
Waste and Rework	Waste and Rework	2/1/2017 12:00 AM to 2/28/2017 11:59...	2/22/2017 11:00 AM	System Generated
Mix Exception	Mix Exception	2/1/2017 12:00 AM to 2/28/2017 11:59...	2/22/2017 9:00 AM	System Generated

## Creating a New Report Template

Select +Report to create a new report template.

+ Report

## Select Report Category and Report

**1. Select a report category.**

**2. Select a report within the selected category.**

**3. Add report description. (will auto populate but can be changed)**

## Select Time and Scheduling Options

Not every report will have Time Period selections.

Ex: Sign Order Invoice

**1. TIME PERIOD**

**2. REPORT LENGTH**

**3. SCHEDULE REPORT**

Schedule Report

Time 5:00 AM

Day 1 of every 1 month(s)

First Sunday of every

Start Schedule On 3/2/2017

Report will next run Saturday, April 01, 2017 5:00 AM

Schedule Verification

### Time Period

- Relative: Provides standard time period options for quick selection.
- Absolute: When selected disables scheduling and provides to and from date selection.

### Report Length

- Provides standard length periods for quick selection.
- Used in conjunction with relative time only.

### Schedule Report

- Must be selected to view scheduling options.
- Available with relative time selection only.
- When enabled provides recurring scheduling options.

## Select Report Parameters

- Every report will display a unique set of parameters fitting to the objectives of the report.
- Each new report template will display a unique set of default selections to help get started.
- Some report templates have a few parameter options and others may have several.

Time Period

Parameters

REPORT PARAMETERS

Show Cost 1

Show Price

Show Details 2

Show Summary

Show Color Mixes 3

Show Color Reduction Mixes

Show Clear Mixes

Show Sealer Mixes

Show Surfacers Mixes

Show Other Mixes

Percent Threshold 4

- 0 % +

Component Weight Unit

Grams 5

Show Wasted Mixes

Selected Job 6

All Jobs

Selected Painter

Select All 7

Component Volume Unit

U.S. Fluid Ounces

Show Volume 8

Parameters Tab

Mix Accuracy Report Example

1. **Pricing:** Options to include price, cost, or both.
2. **Detail and Summary**
  - Details
  - Summary: Some summaries include graph information.
  - Both
3. **Component Inclusion:** Component weight selections.
4. **Weight and Volume:** Options for how component UOM are displayed.
5. **Report Specific:** Some reports may have unique parameters tailored to the report objectives.
6. **Selected Job:** Some reports offer options to run for all Jobs or a specific job.
7. **Selected Painter:** Some reports offer the option to run for all users or a specific user.
8. **Component Volume Unit:** Volume unit selections.



## Preview & Print Reports

After the template is created you can preview the report to verify the report captures the information you are looking for.

Preview Report

The screenshot shows a report preview interface. At the top, there are buttons for 'Template', 'Save', 'Save as New', 'Report', 'Discard and Close', and 'Save and Close'. Below these are navigation icons: a printer icon, a magnifying glass, a zoom-in icon, a zoom-out icon, a refresh icon, and a back icon. The main content area displays a report titled 'Painter Mix Accuracy' for 'Joe's Body Supply TEST'. The report includes a summary section with fields for 'Show Summary', 'Show Details', 'Show Volume', 'Show Price', 'Show Cost', and 'Percent Threshold'. Below this is a table showing 'Category Mix Count', 'Category Component Count', and 'Component Accuracy Deviation' for 'All Users' and individual painters: 'Painter Two', 'Prepper One', and 'Sys Admin'. The table has columns for 'Color', 'Clear', 'Sealer', and 'Surfacer', each with sub-columns for accuracy deviation (0%, 2%, 5%, >5%).

### 1. Template Save Options

- Save:** Once you have confirmed the template produces the report you need, you can save the template.
- Save as New:** If the report was generated from an existing template you want to keep, you can make changes, preview the report and then save the template with a new name preserving the original one.
- All saved templates are stored and displayed on the My Reports Tab on the Reports Main screen.

### 2. Report Save Options

- Discard and Close:** This allows the report to be previewed, possibly printed, but not saved and then return to the Reports Main screen.
- Save and Close:** This allows the report to be previewed, possibly printed, and saved for future retrieval.
- All saved reports are stored and displayed on the Report History tab on the Report Main screen.

**3. Print:** Print to the paper printer selected in Settings and Print Settings.

### 4. View Options

- Magnify view.
- Shrink view.
- Expand report to the edge of the screen.
- Fit entire report to the screen.

## 7. Page Navigation

- Advance to end of the report.
- Advance to beginning of the report.
- Advance to the next page.
- Return to the previous page.

6. **Refresh:** When displaying a report in the office it may be necessary to refresh the report with up-to-date mixing activity.