

Repco Navigator – Smart Quote Integration

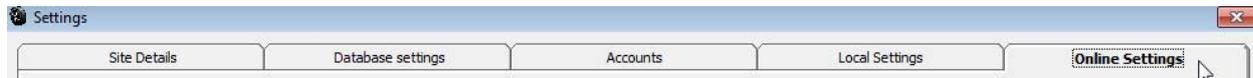
Overview: Microbase in conjunction with Repco Auto Parts have developed a seamless interface that allows Repco customers to order parts on-line via their local purchasing module. Parts identified by Repco part numbers within the Automation stock listing can be selected, placed on a purchase order and transferred directly into the Repco ordering system. The interface constitutes “push and pull” architecture allowing the amalgamation of parts sourced from within Automation or from Navigator to be appended to the final Automation purchase order.

In addition parts can be sourced directly from the job card via the Navigator interface, any selections where there is no stock on hand within the Automation parts listing will result in the purchasing module creating an order for transfer to Navigator.

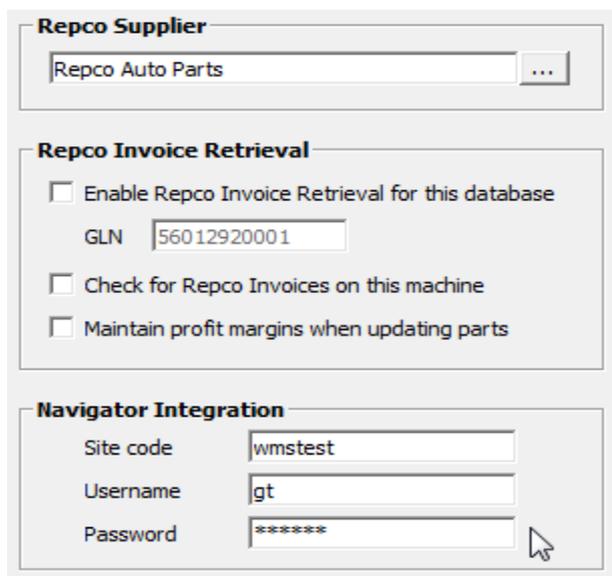
To complete the Repco functionality Automation Premium interfaces with Smart Quote facilitating the download of servicing information either onto a job card or estimate. The manufacturer’s checks for the service type is also imported into Automation.

Navigator Interface Settings: To initialise the interface you must be a Repco customer with a valid account that allows you access to Navigator and Smart Quote. Currently you will use a site code, username and password to activate the Repco modules, these need to be entered into on-line setting within Automation, when recorded you will have a seamless entry to Navigator / Smart Quote i.e.: no need to log on as Automation will perform this task.

Navigator Setup: From Automation Client select File / Settings, point and click on the on-line tab



Selecting On-Line within Automation Client

A screenshot of a software form with three main sections. The first section, "Repco Supplier", contains a text field with "Repco Auto Parts" and a button with three dots. The second section, "Repco Invoice Retrieval", has three checkboxes: "Enable Repco Invoice Retrieval for this database" (unchecked), "Check for Repco Invoices on this machine" (unchecked), and "Maintain profit margins when updating parts" (unchecked). Below the first checkbox is a text field containing "56012920001". The third section, "Navigator Integration", has three text fields: "Site code" with "wmstest", "Username" with "gt", and "Password" with "*****". A mouse cursor is visible over the Password field.

In the center of the form you will see your Repco parameters, select the button to the right of the Repco supplier field, from your supplier listing identify your Repco account from the list, highlight and save with OK. The record will display. Next move down the form and enter the site code, username and password. Save your choices with OK (F12). If you are using the Repco invoice retrieval system there is no need to search your supplier listing for the Repco account as this will already be entered in the supplier field.

Entering The Repco Log On Information

The Job Card, Integration: Create the job card in the normal way, to add parts from navigator directly to the job card select the Navigator option from the bottom of the form you will launch into Navigator. If the vehicle details in Automation correspond with the Repco listing you will be taken to categories for the make, model, series and engine type recorded on the job card. If the

vehicle details are not recognised by Navigator then you will need to “drill down” in the normal way to the specifications required. Use Navigator to select the categories and parts required, populate your order pad, check the items are correct then select the return parts option at the bottom of the Navigator order pad.



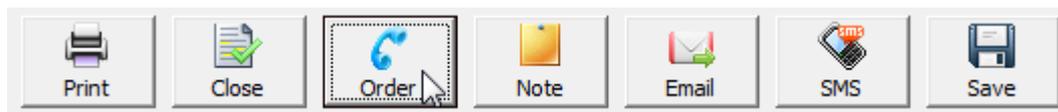
Populating The Order Pad in Navigator

Selecting return order initialises the import of parts to the job card, when the process is complete you may be requested by some browsers to close the web page, if you see this message select yes.

Item	Description	Type	Quantity	Rate	Total (Ex.)	Tax Amt	Tax Code	Total (Inc.)	FP
Gen Serv	Service General Labour	Service	1	\$95.45	\$95.45	\$9.55	GST	\$105.00	
3376093(Repco)	OIL-MAGNATEC 10W40 5L	Inventory	1	\$39.99	\$39.99	\$4.00	GST	\$43.99	
RAF116(Repco)	FILTER ELEMENT-AIR	Inventory	1	\$32.72	\$32.72	\$3.27	GST	\$35.99	
Z79A	FILTER-OIL SPIN ON	Inventory	1	\$11.29	\$11.29	\$1.13	GST	\$12.42	

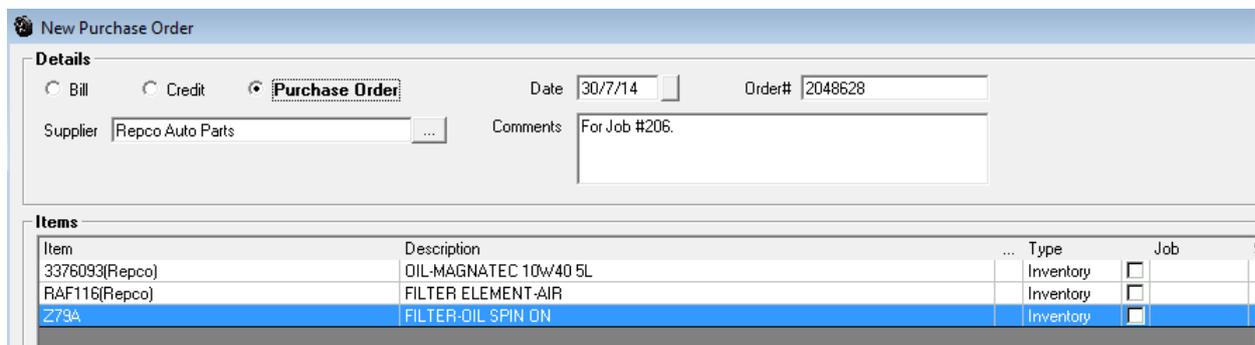
Parts Imported From Navigator.

Parts that are not in the local parts file will be added to the list, any parts that are not available from local stock are highlighted in red. If you wish you can create an order for these items directly from the job card by selecting the order option from the bottom of the form.



Creating An Order From The job Card

When selecting return order you will be prompted to select whether the order is to be made via Repco, to use Navigator select yes, this action will open a purchase order displaying the parts not available on the job card



Viewing The Parts On A PO

If some of the parts to be order are buy-ins, select the line item point and double click, from the part form change the inventory item to a buy-in by selecting the 3 green circles to the right of the type field, close the part form then select the job and service allocation from your PO. To send the order to Repco select the Navigator option at the bottom of form. Again if you are prompted with an option to close a web page select yes. Once the order has been sent to Repco this is indicated on the PO therefore avoiding order duplications.

Purchasing, Integration: To purchase parts via navigator go to purchasing in Automation, select the purchase order option, select your parts to order from your stock list, be aware only parts with Repco numbers will be accepted by Navigator. To process the order select your Navigator option, this action will launch Navigator into the parts ordering screen. If you wish to make further selections from Navigator direct do this in the normal way on selecting send order the PO in Automation is automatically updated with your Navigator selections.

Parts selected in Automation

The screenshot shows a 'New Purchase Order' form. In the 'Details' section, 'Purchase Order' is selected. The date is 30/7/14 and the order number is 2048629. The supplier is 'Repco Auto Parts'. The 'Items' table below shows two items:

Item	Description	Type
Z115	Filter-oil Ryco	Inventory
Z131A	Filter-oil Ryco	Inventory

One addition made in Navigator

PART #	DESCRIPTION	STORE
Z115	FILTER-OIL SPIN ON	Repco Clayton
Z131A	FILTER-OIL SPIN ON	Repco Clayton
N12YC	SPARK PLUG - CHAMPION COPPER PLUS	Repco Clayton

On completing the order 3 items populate the Automation purchase order

The screenshot shows the 'New Purchase Order' form after integration. The 'Items' table now includes three items:

Item	Description	Type
Z115	Filter Oil Spin On	Inventory
Z131A	Filter Oil Spin On	Inventory
N12YC	Spark Plug Champion Copper Plus	Inventory

Navigator, Parts Categories: Unfortunately Navigator does not export any category information so additions to the parts list will need to be categorised (default for Repco locations).

Smart Quote Integration: The integration also allows for importation of servicing information from Smart Quote. The information can be included on a job card or estimate, to enter the Repco system displaying the correct vehicle details it is essential that you complete as much information as possible on the vehicle form – For Repco locations most of this is available from the make and model listing which includes make / model / engine type.

Job Card, Importing Service Parts & Text: Open the job card in the normal way, you can initiate the data transfer to a blank or populated job card. Only exception is the labour service (LAB). Smart Quote brings service times onto the job card as labour, if you already have a labour service on the form it will be overwritten by the imported data. If you wish to use LAB on the same job card or estimate we suggest you place a service on the job card such as 100,000 klm. Service then move the Smart Quote parts to that service, retain labour on the form and add parts as you would normally.

Service parts, labour and text in Smart Quote

The screenshot displays a quote interface with the following details:

BRAND	PART NO	DESCRIPTION	COMMENTS	PCQ UOM	PRICE INC	QUOTE PRICE	EXT QUOTE
OIL FILTER							
RYCO	Z78AHE	FILTER - OIL HIGH EFFICIENCY		1 EACH	\$19.99	\$19.99	\$19.99
SPARK PLUG Where fitted, platinum tipped plugs: every 60 000 miles/100 000 km or 60 months							
CHAMP	RC9MC4	SPARK PLUG - CHAMPION COPPER PLUS		4 EACH	\$4.99	\$4.99	\$19.96
WORKSHOP CONSUMABLES AND CHARGES							
ENGINE OIL	OILSEMISYN	S/10W-30 SM/CF Semi Synthetic		3.80		\$7.50	\$28.50
LABOUR	LABOUR	LABOUR (PH)		1.8 HOURS		\$110.00	\$198.00
WASTE MANAGEMENT FEE	EPA1	WASTE MANAGEMENT FEE		1		\$25.00	\$25.00
WORKSHOP SUPPLIES	WS1	WORKSHOP SUPPLIES		1		\$10.00	\$10.00

100,000 km or 60 mths

ADDITIONAL PARTS
Honda also recommends the replacement of the following parts, which are not included in the quote price:
Balancer shaft drive belt

Service Operations

VEHICLE ON FLOOR

- Brake servo
- Footbrake travel
- Parking brake travel
- ABS warning system
- Fault diagnosis trouble codes
- Instruments
- Switches/controls
- Park/neutral position (PNP) switch
- Heater blower
- Horn
- Steam

On selecting the return quote option parts service and text populate Automation Premium

The screenshot shows the Automation Premium interface with the following sections:

- Client Details:** Connectup Pty Ltd, 84 Pebble Beach Drive, Runaway Bay QLD 4216, Work: 55639732, Mobile: 0428-640622
- Vehicle Details:** Honda Civic, Odo: 09699H, RSA Expiry: , Layoff: , Parts: , Next Service:
- Work Done:** 100,000 km or 60 mths. Includes the same 'ADDITIONAL PARTS' and 'Service Operations' checklist as the previous screenshot.
- Parts & Labour:**

Item	Description	Type	Quantity	Rate	Total (Ex.)	Tax Amt	Tax Code	Total (Inc.)	PP
LAB		Service	1.8	\$100.00	\$180.00	\$18.00	GST	\$198.00	
Z78AHE	FILTER - OIL HIGH EFFICIENCY	Inventory	1	\$19.17	\$19.17	\$1.82	GST	\$19.99	
RC9MC4	SPARK PLUG - CHAMPION COPPER PLUS	Inventory	4	\$4.94	\$19.76	\$1.81	GST	\$19.96	
OILSEMISYN	S/10W-30 SM/CF Semi Synthetic	Catalog	3.8	\$6.82	\$25.91	\$2.39	GST	\$28.50	
EPA1	Fee	Inventory	1	\$11.82	\$11.82	\$1.18	GST	\$13.00	

The screenshot shows a text editing window with the following elements:

- An **Add** button with a plus icon.
- A **Fixed width** checkbox.
- A **Check** button with a checkmark icon.

Text Editing, Smart Quote Import: Text imported from Smart Quote often contains checklists, for Automation to import these lists in columns our text field has to be reset to courier. When using Smart Quote checklist you will need to retain this font for any additional text in the work done field. To change the text box font type select the fixed width option located to the right of the field.

Note: Once selected all text in that field will be fixed width.

Parts Ordering: If you wish to order parts directly from the job card via navigator select the order option from the bottom of screen, parts listed in red will be inserted onto the purchase order for transfer via the Navigator utility.

Service Text: If you do not wish to import service text to the job card there is a global setting in File / Settings / On-Line that disables this feature. If you wish to delete text from a job card simply highlight using your mouse and press the delete key on your keyboard.

Estimates, Smart Quote: To populate an estimate using Smart Quote follow the same process as described for a job card. The parts order will not be visible in purchasing until the estimate is converted into a job. To upload an order follow the instructions in this section.

Repcos Locations, Invoice Retrieval: Microbase passes the order number onto Repco via Navigator, if this order number is received with the on-line invoice it will convert the original order into a bill. We do suggest whether you use invoice retrieval or not you regularly check your purchase orders to ensure there is not a "back log" of orders that have already been delivered.

Converting Orders To Bills: When parts are delivered it is possible to convert the original purchase order to a bill by simply opening the purchase order, selecting the radio button titled bill and entering the supplier invoice number. For further information on this process refer to the purchasing notes in your operations manual.

Purchase Buy-Ins using Repco Navigator

01. Open Job/Invoice
02. Click on Navigator Button
03. Navigator Opens
04. Choose your category
05. Choose your parts and adjust quantity's
06. Click on the Return Parts button
07. Navigator window closes
08. Parts chosen are processed and placed on to the Job/Invoice
09. Those parts needed are highlighted in bold Red
10. Click on the Order button
11. Confirm parts and quantity's to be ordered
12. Click on Navigator button
13. Navigator opens at the order window
14. Click on the Submit button to order parts
15. Navigator closes and returns you to Automation.

Purchase Inventory using Repco Navigator

01. Click on the Purchasing button at top of screen
02. Click on Orders button
03. Click on the New button and choose Repco Auto Parts
04. Click OK
05. Click Add Inventory
06. Search and choose inventory items
07. Click OK
08. Adjust quantity's required
09. Click on Navigator button
10. Navigator opens at the order window
11. Click on the Submit button to order parts
12. Navigator closes and returns you to Automation.