

Release Notes Client Version 3.5.6

Introduction

Version 3.5.6 sees the introduction of an on-line job card that can be accessed from any peripheral device via a browser. The Microbase team have been working on this application for almost 6 months and are extremely pleased with the final result as we believe the use of mobile devices will introduce greater efficiencies to your business which are specifically geared toward improving your profitability.

Imagine there is no longer a need to use hand written job cards, the technician will in effect create the job card in the service bay, all the back office has to do is check the entries and finalise. The technician is aware in real time of parts order status, he can even nominate a preferred supplier when raising an order request to the back office. To make his work life even simpler he has the ability to log on / off of jobs and has direct access from the application to parts suppliers Repco and Coventrys via Navigator and Pro-Link.

The job card is the first of a suite of on-line applications that Microbase is committed to develop over the next couple of months, these include the bookings form, stock take worksheet and reporting.

Additions to this version also include changes to credit card surcharge management, you can now add as many credit card types as you wish with varying service fees. We have updated the postcode database and placed a new help system on-line, we assure you we are extremely committed to continually improve our on-line resources to assist you with any facet of the Automation application. For Repco users there is the addition of data transfer for client survey purposes, initialised from site settings with one mouse click.

Please read through these notes which include full instructions on how to setup and use the on-line job card application. We hope you are excited as us about this major release, this is only the first step on a development path that is geared to keep Automation ahead of any other SME service centre software available – Enjoy !

Credit Card Surcharge Management

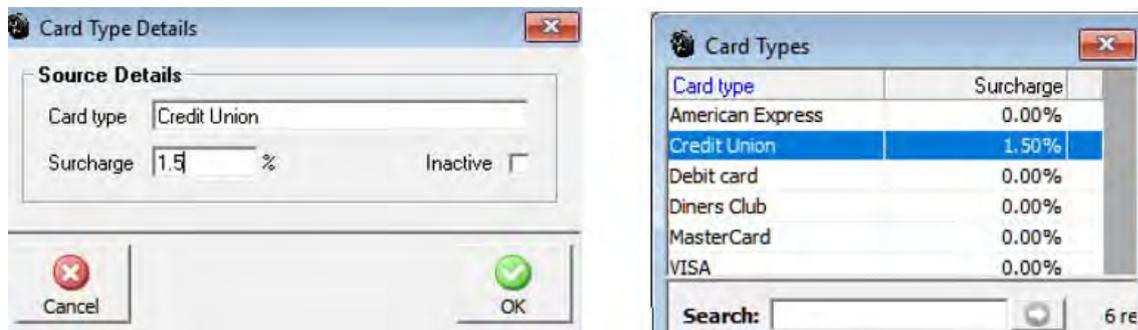
This version sees the introduction of a new table entry feature for credit card surcharges, essentially this means you can add as many credit card surcharges as you wish. To setup select File / Site Settings / Accounts. At the bottom of form you will see a manage selection under the Credit Card Surcharge heading, click on this to open the credit card input table.

The screenshot shows two panels. The left panel, titled 'Credit card surcharges', contains a 'Manage...' button. The right panel, titled 'Super payment schedule', contains two dropdown menus for 'Day/month' and one for 'Frequency'.

The screenshot shows a window titled 'Card Types' with a table of card types and their surcharges. Below the table is a search bar and a toolbar with buttons for Cancel, Edit, New, Delete, and OK.

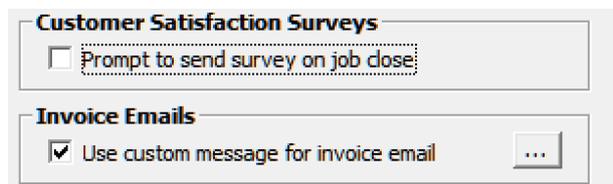
Card type	Surcharge
American Express	0.00%
Debit card	0.00%
Diners Club	0.00%
MasterCard	0.00%
VISA	0.00%

Credit Card Surcharges, Creating New: Select new from the bottom of the display, enter the name of the credit card into the card type field, the percentage is recorded as a surcharge, finally select OK (F12) to save the new entry in the list. Exit out of site settings with OK (F12).



Repro Customer Satisfaction Survey

To activate customer survey emails open File / Site Settings / On-line, down on the bottom right hand side of the form you will see a customer satisfaction survey option, to initialise point and click on the check box. Once activated you will be prompted on job close to send / not send a survey option via email to the client.



Postcodes Updated

Version 3.5.6 accesses the latest postcode listing available from Australia Post.

New Help Options

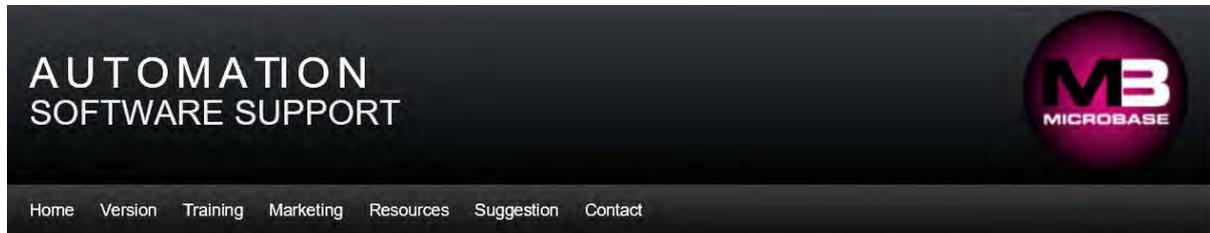
The new release now has access to an on-line help system, to open select the help option from the top of screen

Help



There are also two new help resources available from the **on-line menu**, the link takes you directly to the notes and release documents stored on the Microbase web site. This resource is particularly handy if you need access to notes on previous enhancements.

Release Notes



Ever Wonder What That Last Update Contained? Read On.

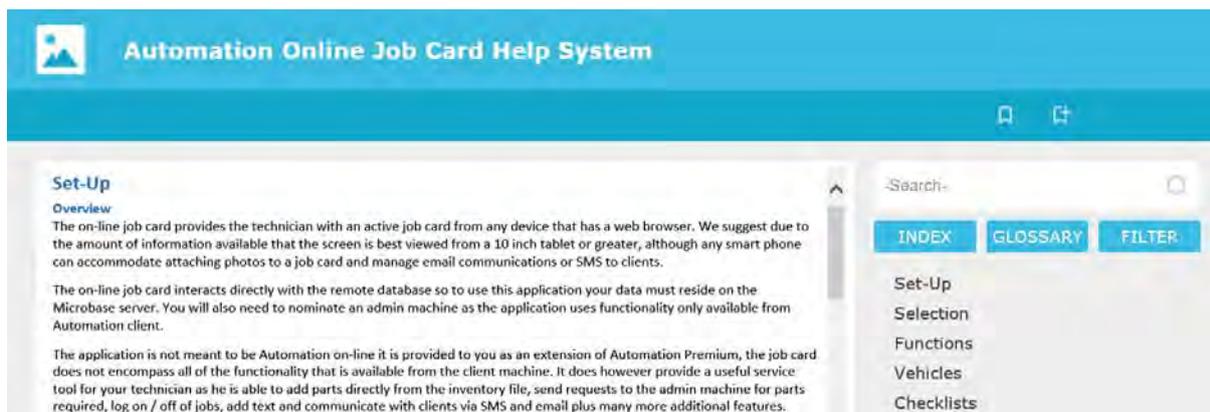
VERSION	DESCRIPTION	NOTES
Server 3.3.8	Pre Installation of new development module to allow for upcoming new program functions.	
Client 3.5.5	Inventory Valuation introduced 2 methods of viewing the report one that looks at inventory currently on hand the second method calculates all stock move-	

Menu Navigation

- Home
- Latest Version
- Extra Training
- Marketing
- Suggestions
- Contact Us

You can also access the help system written specifically for the on-line job card from the same menu by choosing the **On-Line Job Card** option

On-Line Job Card



On-Line Job Card Instruction Manual

Also available on line <http://www.microbase.com.au/OnlineHelp/JobCard/index.htm>

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Overview

The on-line job card provides the technician with an active job card from any device that has a web browser. We suggest due to the amount of information available that the screen is best viewed from a 10 inch tablet or greater, although any smart phone can accommodate attaching photos to a job card and manage email communications or SMS to clients.

The on-line job card interacts directly with the remote database so to use this application your data must reside on the Microbase server. You will also need to nominate an admin machine as the application uses functionality only available from Automation client.

The application is not meant to be Automation on-line it is provided to you as an extension of Automation Premium, the job card does not encompass all of the functionality that is available from the client machine. It does however provide a useful service tool for your technician as he is able to add parts directly from the inventory file, send requests to the admin machine for parts required, log on / off of jobs, add text and communicate with clients via SMS and email plus many more additional features.

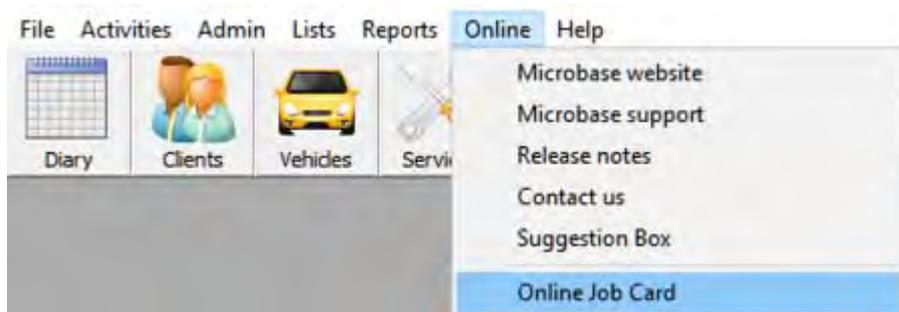
Our goal in writing the on-line job card was to create efficiencies within your organization by allowing technicians access to a tool that allows them to build the job card in real time and easily communicate with administration as they require specific items, the order status of which can be monitored from the digital job card. In reality providing this extension will result in the technician spending more time where he should – In the service bay, added efficiencies will come into play in the back office as there is no longer a need to transpose a written job card into an invoice as the technician prior to assigning the job a close status will have completed all the necessary information.

The help files are to be used in conjunction with on-line application so you have a full understanding of how this powerful tool will have a positive influence on your service centre.

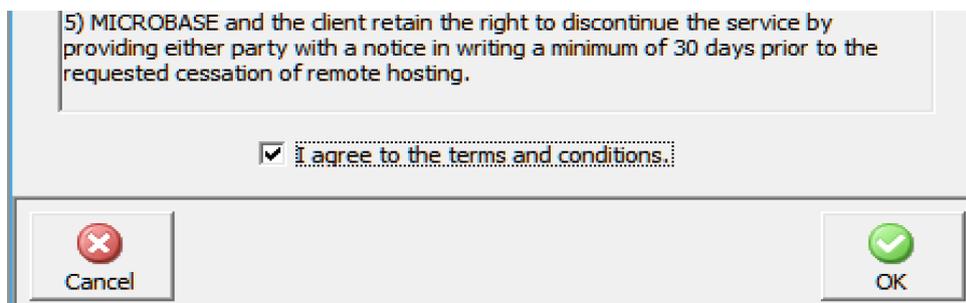
Set-Up

Firstly your data must reside on the Microbase remote server please see the relevant help files in the Automation Premium application on how you can change from a local server to remote. Once this process is complete you are ready to implement your on-line job card.

On-Line Job Card Access, Requesting: Go to your On-line menu at the top of the Automation Client screen, from the drop down select on-line Job Card.



On selection we will check to see if your data is stored on the Microbase server, if it is not you will be requested to transfer your data. Next we display the terms and conditions of use, please read these and select from the bottom form agree

A screenshot of a dialog box containing terms and conditions. The text reads: "5) MICROBASE and the client retain the right to discontinue the service by providing either party with a notice in writing a minimum of 30 days prior to the requested cessation of remote hosting." Below the text is a checkbox with a checkmark, labeled "I agree to the terms and conditions.". At the bottom of the dialog box, there are two buttons: "Cancel" on the left and "OK" on the right.

Next you will receive a confirmation that your request has been sent.

Automation Client 356



Request for Online Job Card access has been sent.

When the permissions have been set an email will be sent to your address in site settings the email includes a link to the on-line job card log-in.

Online Job Card access granted

From: noreply@microbase.com.au

You have been granted access to the online job card.

To login, simply click on the following link:

[Online Job Card](#)

Accessing Site Data: Automation on-line job card will interact with the security settings of Client, this avoids having to provide the database master password to an employee, to access the data you must first setup security on your local machine. You will also need to flag a user to gain access via the on-line job card.

Setting Security

To set the security function it will have to be enabled from site settings / database settings / manage users.

Security, Enabling: Point and click on the enable option positioned above the manage users button. Next you need to enter the user's name (this will be their unique log in), set the user type, establish the permissions and enter a password. The password can be in text, numbers or a combination; the password field is case sensitive so if you enter a letter in capitals it must be typed in the same way for the user to be logged on.

Note: that when entering your password you are asked to confirm by re-typing, if the combination does not match the original entry a message is displayed. Simply re-key correctly.

Username:

Type: Hidden

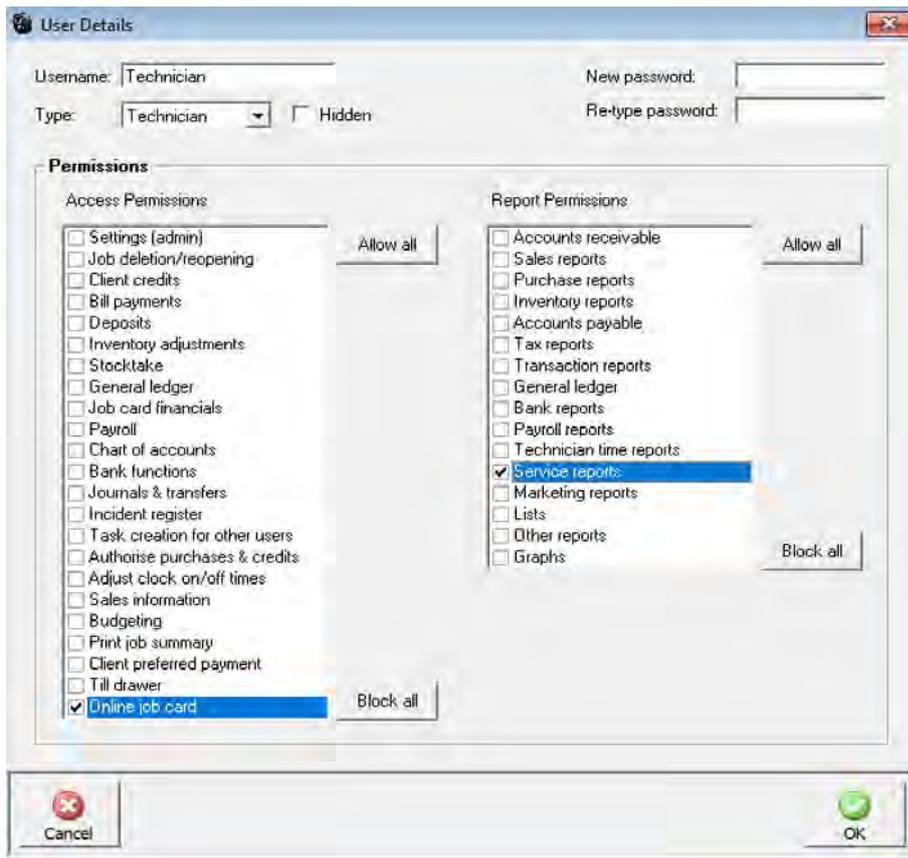
Security

Enable Security

Auto-logout when idle for minutes

To select the user type point and click on the down arrow situated on the right hand side of the type field. There are three user types Manager – Usually would have full access, Office – Access to limited administration functions, Technician – Access to jobs, including the on-line application and the accompanying functions only with no access to administrative tasks.

The allow all and block all function is a quick way to set or secure access to all functions, you can use this as a short cut, then simply edit the selections you wish to change.



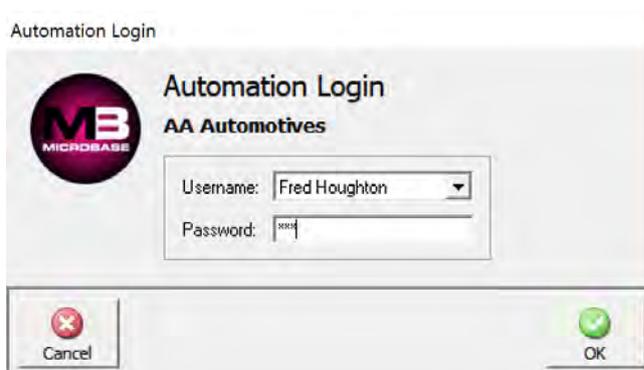
Note: It is important that you retain your password in a SAFE place as loss can cause operational problems. It is also suggested that you limit your password to a maximum of 6 characters so it is easy to remember.

Security, User Default: To setup a new user select manage users from the configuration screen, select new, the user details form is displayed. Enter the user name, select the user type, enter the password (remember this is case sensitive), confirm by retying in the re-type password field. Next point and click on each function you wish to give the user access to. Report permissions allow the user to print or not print all reports in the group selected.

Note: You will need to select the On-line job card option from the user profile access permissions to gain access to your data from the on-line application. It is not necessary to use full security from the terminal for on-line job access, so you don't have to log into the application each time if you choose not to.

In this case simply create user profiles for those that require on-line job card access, ensure the On-line job card option is selected and **do select** the manage users option from settings.

Security, Log On: Once security is set you will need to log on to use the program, on start up a log in message is displayed, type the user name or select from the drop down list, enter the password and press enter or select OK.



If a user attempts to access functions that have not been selected in the security profile an access denied message is displayed. It is however possible to change a user's access at any time by selecting File / Settings / Configuration / Manage Users. It is of course suggested that only the manager has access to the setting option to prevent unauthorized use of the program.



Security, Log Out: To log out of Automation select file / logout, this procedure will log you out of the program displaying the log in message for the next user to sign back in. If security is a concern it is suggested that you log out whenever you leave the terminal and log back in when you return.

Auto Log Out When Idle: This options allows the operator to set an auto log out period when the terminal is inactive. Enter the minute value into the field provided, once this period is exceeded you will be required to log back into the system.

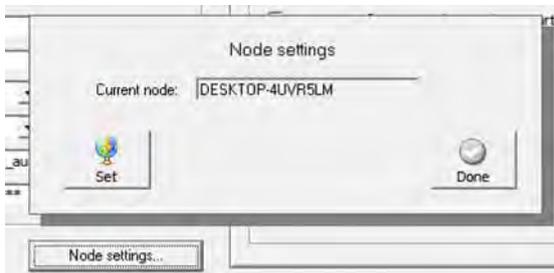
Job Card Node Communication

At this point it is important that you understand the relationship between your on-line job card, the remote server database and the local machine running Automation Client. Obviously both the terminal running client and the job card are communicating with the database so data is constantly moving back and forth between terminal, remote server and on-line job card.

To make all functions available there is however a second line of communication required from the job card via the server back to the node terminal. Basically the node terminal shares some of its functionality with the job card, for instance the sending of SMS messages and accessing security settings.

Additionally the job card allows communications to go back to the terminal set as the node machine, there can only be one node machine on network. This is the terminal that will receive the order requests from on-line job cards that need to be processed from the terminal as unlike the terminal job card the on-line version has no purchasing function.

Setting the Node Machine: To set the node machine (admin) select File / Site Settings / On-Line down on the bottom left hand side of the form you have a node option.



Point and double click on node, select set the name of your PC with be inserted into the current node field, if used previously the setting is overwritten. Finalise the procedure with selection of the done option. Your machine is now set as the node so the on-line job card can share certain functionality.

Logging On

Open your tablet, access the internet browser and go to:

<http://www.microbasedb.com.au/jobcard/login.php>

On connection you will have the ability to locate your site data, click on the down arrow to the right of the database field, scroll down to your location and double click. Next you will see the login option which is the same as your local client, to choose the user select the down arrow to the right of the username field, point and double click on the required record, type the password and select OK, you now have access to your data via the on-line job card application.

Automation Online Job Card Login

Database:

User:

Password:

Login

Automation Online Job Card Login

Database:

User:

Password:

Login

Automation Online Job Card Login

Database: A1 Microbase Test Data

User: Admin

Password: Technician

Login

Automation Online Job Card Login

Database: A1 Microbase Test Data

User: Technician

Password: ●●●

Login

Selection

On opening you will see a list of open jobs, fields the records are listed in order of finish date and time, fields include job #, client, registration, make / model, service due (first service listed) and finish time. The finish time column is colour coded, red indicating that the job is open past the time originally scheduled, a green background is applied to jobs that are open within the original scheduled time entered in your diary screen.

Refreshing

Changes within your diary screen will only be reflected on this screen when the page is refreshed. I.e: closing and re-opening this can be done by selecting a job and then coming back to the open job list. Please note that once a job is closed it will no longer be in the open jobs list on your tablet and as such can no longer be accessed by the device.

AA Automotives - Open Jobs

Job#	Client	Rego	Make/Model	Service	Finish
253	Suttons Motors Homebush	07A9393	HOLDEN Commodore SSV Redline	Service And Safety Check	12/9/2011 5:00pm
245	Suttons Motors Homebush	C12JV	HOLDEN COMMODORE SSV	Log Book Service 90,000km	19/1/2017 5:00pm
182	Robb, Dorothy	DOT001	NISSAN NISSAN MICRA	Log Book Service 60,000km	8/7/2017 5:00pm
131	Howard, Fred	TTT	BMW 318i 1.8L E36 EFI 91/93	Log Book Service 70,000km	17/8/2017 11:00am
219	Smith, Eric	880BGD	FORD COURIER 2WD 2.0 (C) 86/90	Log Book Service 120,000km	17/8/2017 5:00pm
227	Natalie Keane, Natalie	WOF251	HOLDEN COMMODORE VX V6 00/02	Log Book Service 195,000km	21/8/2017 5:00pm
243	Belmont Salvage Yard	7PO654	CHRYSLER CRUISER PT 2.0L 00/01	Log Book Service 60,000km	31/8/2017 5:00pm
233	Belmont Salvage Yard	7PO654	CHRYSLER CRUISER PT 2.0L 00/01	Log Book Service 60,000km	2/9/2017 5:00pm
54	Marshall, Mandy	8PO777	HOLDEN COMM. VTII V8 5.7L 99/01	Major Service	5/9/2017 1:15pm
205	Dennis Nash Backhoe Hire	7LL555	Audi (Lnc) A3 1.8i Sedan 97/00	Log Book Service 130,000km	5/9/2017 5:00pm
179	Tynan Mitsubishi	1DZO251	MITSUBISHI EXPRESS	Brake Disc Machine	5/9/2017 5:00pm
223	Turner	7OO123	HOLDEN APOLLO JK.CARB. 89/91	Lp Gas Tune	5/9/2017 5:00pm
135	Greava, Marry	NA	crv	Log Book Service 100,000km	5/9/2017 5:00pm
117	Haldane, Sue	HGF 678	MITSUBISHI LANCER	Hi-tech Tune 4 Cyl.	5/9/2017 5:00pm
111	Moore, Eddie	7LK556	Mazda MAZDA3	Service And Safety Check	5/9/2017 5:00pm
107	The Games Place	7JJ666	Daihatsu Charade G200 Eff 97/98	Air Conditioning Service	5/9/2017 5:00pm
196	Vincent, Harry	7UU821	HYUNDAI EXCEL .CARB. 86/90	Log Book Service 110,000km	5/9/2017 5:00pm

Search:

Local time: 05-09-2017 14:26 Timezone: +420

Searching Open Jobs: You can search the open jobs list by any combination of alphas and numerics for instance if you wanted to locate job# 245 simply enter 245 into the search field at the bottom of the form. To search by client enter Moore and once moor the cursor will more to an open job that has a field matching that criterea.

Opening A job: To open a record simply double tap on the line and the relevant job card will open.

Job Card Selection, Exiting: To exit back to the login screen double tap on the cross located at the top of form on the right hand side.

Functions

Overview

The on-line job card gives access to the following functions from the task bar located under the parts and labour section of the form:

Adding Services, adding parts (from inventory and catalogue), removing parts and services. Taking and adding photos to the job including emailing images directly to the client, parts ordering from both Pro-Link (Coventrys) and Navigator (Repc), the ability to clock on/off technicians.

Text fields available include work done and vehicle faults including the ability to paste stored stories and vehicle faults directly into the text areas.

From the bottom task bar you can cancel out of the form, select and edit vehicle records, view vehicle history, access checklists, send a close request to the admin machine, transfer an order for parts listed on the job card that are not available. Send an order request for items required specifically for a job to the admin machine, send emails and SMS communications directly to the client and finally exit out of the job card with an OK option.

Parts & Labour: The parts and labour section of the job card displays services, indicating whether they are fixed price or to be sold on a parts and labour basis, inventory, catalogue and buy-ins (ordered by admin) pricing, quantity and order status.

Quantity and price fields are fully editable from the form by simply double point on the cell changing the numeric and then saving with your return key.

2:59 pm 64%

microbasedb.com.au

AA Automotives - Job #54

Client details

Mandy Marshall
56 Reginald Street, Maniana, WA 6107
Home: (08) 94585625 Mobile: 0412951377

Vehicle details

Rego: HOLDEN COMM. VTII V8 5.7L 99/01
Odo: 52312 Loyalty: 16/10/2002 Points: 169
RSA expiry: 16/4/2003 Next service: 7/10/2017

Parts & Labour

Item	Description	Type	Order	Qty	Rate	Total(Ex)	Tax	Total(Inc)	FP
Mj1	Major Service	Service		2.78	\$81.82	\$227.27	\$22.73 GST	\$250.00	<input checked="" type="checkbox"/>
1005-31	Engine Oil (1 Litre) Castrol Gtx2 15w-40 Sj/cf	Inventory	Ordered	5	\$7.01	\$35.04	\$3.50 GST	\$38.54	<input checked="" type="checkbox"/>
ROF1	Oil Filter - Repco Rof1	Inventory		1	\$5.60	\$5.60	\$0.56 GST	\$6.16	<input type="checkbox"/>
1051-37	Hypoid Gear Oil (castrol Epx 1 Litre) 80w-90 G15	Buy-In		1	\$5.08	\$5.08	\$0.51 GST	\$5.59	<input type="checkbox"/>
1031-57	Engine Oil (valoline Lo-vis1 Litre) 5w-30 Sh/cf	Inventory	Ordered	1	\$4.55	\$4.55	\$0.45 GST	\$5.00	<input checked="" type="checkbox"/>
WYNNNS	Wynns	Inventory	Ordered	1	\$13.64	\$13.64	\$1.36 GST	\$15.00	<input checked="" type="checkbox"/>
1051-57	Engine Oil (Valvo XLD Plus 1 litre) 20W-50 SH/CF	Inventory		1	\$2.90	\$2.90	\$0.29 GST	\$3.19	<input checked="" type="checkbox"/>
1226-89	Automatic Trans (Type 95LE 1 litre)	Inventory		1	\$5.38	\$5.38	\$0.54 GST	\$5.92	<input checked="" type="checkbox"/>
Z154	Oil Filter	Inventory		1	\$7.45	\$7.45	\$0.75 GST	\$8.20	<input type="checkbox"/>
Z332	Fuel Filter	Inventory		1	\$40.00	\$40.00	\$4.00 GST	\$44.00	<input type="checkbox"/>
GH11	Light Globe	Buy-In	Ordered	1	\$35.55	\$35.55	\$3.56 GST	\$39.11	<input checked="" type="checkbox"/>
95421	Master Cylinder	Buy-In	Complete	1	\$280.00	\$280.00	\$28.00 GST	\$308.00	<input checked="" type="checkbox"/>

Work done

Remove And Replace Brake Master Cylinder, Flush Braking System, Bleed And Road Test.

Remove And Replace Rear Wheel Cylinders, Bleed System, Road Test.

Remove & Replace Radiator, Service. Flush Engine Block, Replace Inhibitor, Check Radiator Cap Operation And Pressure Test System.

Remove And Replace Rear Wheel Cylinders, Bleed System, Road Test.

Remove & Replace Radiator, Service. Flush Engine Block, Replace Inhibitor, Check Radiator Cap Operation And Pressure Test System.

Remove & Replace Radiator, Service. Flush Engine Block, Replace Inhibitor, Check Radiator Cap Operation And Pressure Test System.

Remove & Replace Heater Core. Check Operation, Replace Inhibitor And Pressure Test System.

Vehicle report

Air Conditioning Controls Faulty.

Summary

Item	Value
Total(Ex)	\$285.40
Tax Total	\$28.55
Rounding	\$0.00
Total(Inc)	\$313.95

Adding Parts & Services

Services, Adding: To select a service double tap on the Add service option, the service listing will display, there is a search option at the bottom of screen that allows you to search by any alpha or numeric in the list. To select the services required double tap on the checkbox to the right of the screen. You can select single or multiple records, to paste into the job card select the OK option down on the lower right hand side of the form.

Services, deleting: To delete a service highlight the record by tapping on the line, next select the remove function located at the bottom of the parts and labour section. All parts associated with the service will be removed.

Code	Service	FP	Price (Inc)
001	General And Safety Check	No	\$44.00
070	Log Book Service 10,000km	No	\$0.00
075	Log Book Service 15,000km	No	\$0.00
076	Log Book Service 20,000km	No	\$0.00
077	Log Book Service 30,000km	No	\$0.00
078	Log Book Service 40,000km	No	\$0.00
079	Log Book Service 45,000km	No	\$0.00
080	Log Book Service 50,000 Km	No	\$0.00
081	Log Book Service 60,000km	No	\$0.00
072	Log Book Service 70,000km	No	\$0.00
083	Log Book Service 80,000km	No	\$0.00
084	Log Book Service 90,000km	No	\$0.00
100	Log Book Service 100,000km	No	\$0.00
110	Log Book Service 110,000km	No	\$0.00
120	Log Book Service 120,000km	No	\$0.00
130	Log Book Service 130,000km	No	\$0.00
140	Log Book Service 140,000km	No	\$0.00
150	Log Book Service 150,000km	No	\$0.00
160	Log Book Service 160,000km	No	\$0.00
190K	Log Book Service 190,000km	No	\$0.00
210,000	210,000	No	\$0.00
Act	Hiltech Tune 4 Cyl	No	\$90.00
6ct	Hiltech Tune 6 Cyl	No	\$99.00
8ct	Hiltech Tune 8 Cyl	No	\$110.00
AC5VC	Aircon	No	\$0.00
Air	Air Conditioning Service	No	\$149.00
At	Automatic Transmission Flush	No	\$80.00
Bdn	Brake Disc Machine	No	\$0.00
Bsf	Brake System Flush	No	\$49.00
B5R	Brake Shoe Replacement	No	\$99.00
Carb	Carbon Clean Fuel Injector Service	No	\$130.00
Coil	Carbon Clean Diesel Injector Service	No	\$125.00
Coil	Cooling System Service	No	\$75.00
Cvs	Convent Vehicle Surcharge	No	\$0.00
Obs	Drum Brake Service	No	\$139.00
DBSF	Disc Brake Service Front	No	\$140.00
DBSR	Disc Brake Service Rear	No	\$140.00

Parts, Adding: Highlight the service you wish to add the parts to, select the add part option from under the parts and labour section. Again from this screen you have a search option that references the entire list, so you can search by part number or key word. To select the parts required double tap on the checkbox to the right of the screen. You can select single or multiple records, to paste into the job card select the OK option down on the lower right hand side of the form.

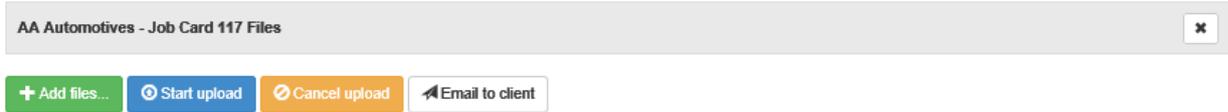
Note: It is **not possible to add Buy-in items** directly to the job card, on selection the following message is displayed - Buy-ins can't be processed from the remote job card. It is suggested you raise an order request for admin to process Buy-Ins or convert them to inventory. Please process buy-ins via a desktop on your network.

Services, deleting: To delete a part from the job card highlight the record by tapping on the line, next select the remove function located at the bottom of the parts and labour section. Parts can only be removed singularly.

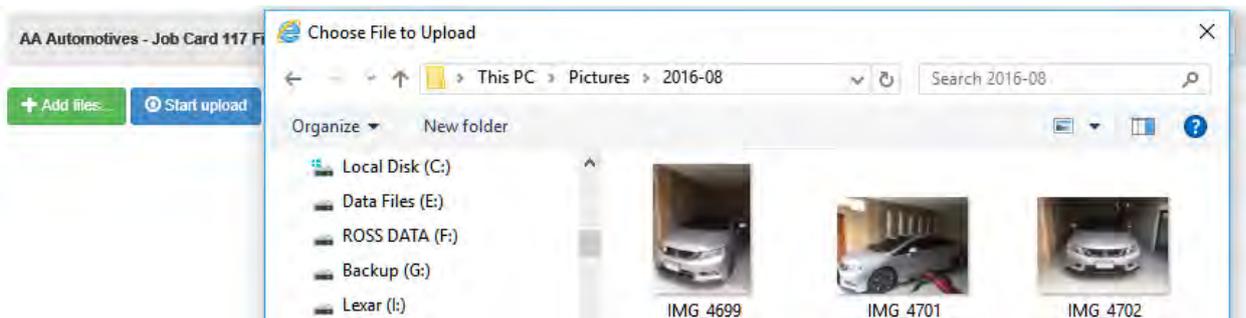
Part Number	Part	Type	Available	Price (Inc)	Location
1005.51	Engine Oil (1 Litre) Castrol Quad 15w-40 Sp-4	Inventory	278	\$7.70	
1033.57	Engine Oil (Synthetic 1 Litre) 5w-30 Shell	Inventory	208.5	\$4.10	Back 1
1035.57	Engine Oil (Synthetic 1 Litre) 30-300	Inventory	0	\$0.52	
1035.57	Hybrid Gear Oil (Synthetic 1 Litre) 80w-90 GM	Buy In	18	\$0.88	
1081.36	Gear Oil (Castrol 1 Litre) LSA 80W-140 GL-5	Inventory	3	\$7.89	
1081.46	Gear Oil (Castrol 1 Litre) USA 90 GL-5	Inventory	102	\$7.29	
1051.49	Manual Trans Oil (Castrol VMAX 80) 75W-80W GL-4	Inventory	2	\$7.27	
1051.57	Engine Oil (Valvol XLD Plus 1 litre) 20W-50 SHCF	Inventory	3	\$3.19	
1054.57	Engine Oil (Valvol XLD Plus 1 litre) 20W-50 SHCF	Inventory	100	\$2.81	
1077.19	Castrol (TRANSMAX 75) Dexron II / III	Inventory	2	\$14.34	
107781	Auto Trans Oil (Syn-1 1 Litre) Sp-220m	Inventory	-2	\$10.64	
1079.57	Engine Oil (Valvol Diesel 1 litre) 15W-40 CH-4SJ	Inventory	-10	\$3.85	
1095.13	Engine Oil (1 Litre) Castrol Quad 15w-40 Sp-4	Inventory	-1	\$4.00	
1095.68	Auto Trans Oil (TRANSMAX M31 1 Litre) Dexron 80	Inventory	-2	\$4.69	
1095.90	Engine Oil (1 Litre) Castrol 140 Sw-30 Sp-4	Inventory	-2	\$0.81	
1092519	Tuning Ball	Inventory	-2	\$21.00	
109490	Pentac Pro Extra 10w-60 Semi Synthetic Engine Oil	Inventory	1	\$0.50	
1101.08	Hybrid Gear Oil (Castrol M80w 1 Litre) 75w-90 GL-5	Inventory	0	\$0.69	
1105.24	Dexron 80	Inventory	1	\$0.87	
1108.22	Engine Oil (Castrol Gas 1 litre) 15W-40 CF-4/5W	Inventory	1	\$4.21	
1111.48	Engine Oil (STD Diesel 1 litre) 15W-40 CS-4/5W	Inventory	-1	\$4.38	
1116.95	Manual Trans Oil (VMAX 80 1 litre) 75W-80W GL-4	Inventory	1	\$0.26	
1151.05	Auto Trans Oil (TQM-5T 1 litre) SP-220M	Inventory	0	\$0.55	
1151.08	Automatic Transmission Oil (TQM-5PT) (per litre)	Inventory	-2	\$11.09	
1155.60	Engine Oil (Castrol Magnatec) 15W-50 SJ/CF	Inventory	-6	\$4.76	
1159.87	Engine Oil (Castrol TCT 5T 5W-30)	Inventory	1	\$10.67	
11A0850	Fan Belt 11a0850	Inventory	9	\$5.71	Wall 1
11A090	Fan Belt 11a090	Inventory	3	\$11.20	Wall 1
1200.89	Hybrid Gear Oil (Castrol HP 1 litre) 80W-90 GL-5	Inventory	0	\$3.57	
1209.58	Hybrid Gear Oil (Castrol HP 1 litre) 80W-90 GL-5	Inventory	0	\$0.60	
1214.89	Automatic Transmission Fluid (Type M) (1 litre)	Inventory	1	\$9.14	
1215.57	Automatic Transmission Fluid (Dexron 80) (1 litre)	Inventory	1	\$4.24	
1215.57A	Hybrid Gear Oil (Dexron 80) (per litre)	Inventory	0	\$4.24	
1216.58	Hybrid Gear Oil (HP 1 litre) 80W-140 GL-5	Inventory	-0.25	\$4.87	
1209.89	Automatic Trans (Type 90L.E. 1 litre)	Inventory	11	\$0.92	
1245.89	Hybrid Gear Oil (HP L.S. 1 litre) 90 GL-5	Inventory	1	\$7.43	
1264.89	Manual Trans Oil (Valvol Damaged) 75W-80W GL-4	Inventory	1	\$0.66	

Photos & Files

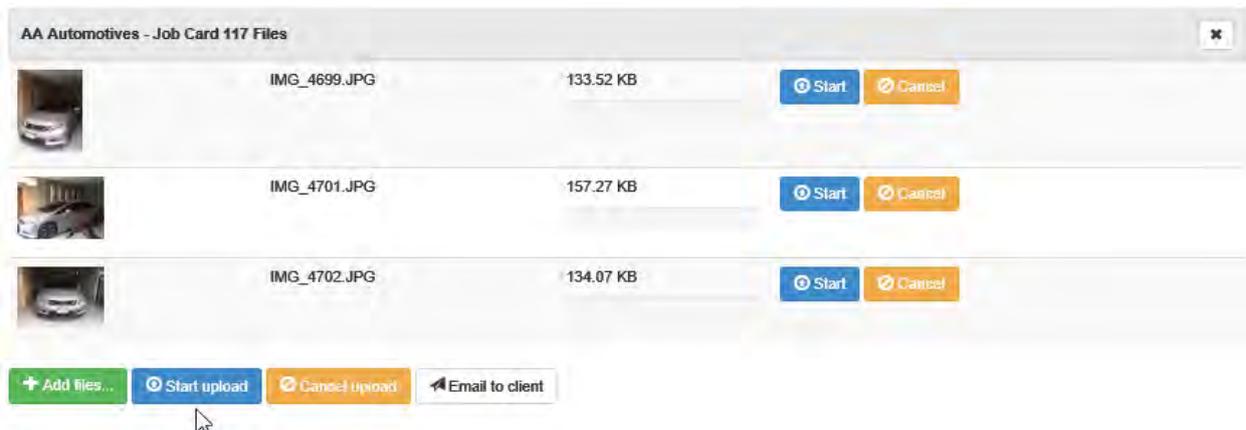
Files Function: Select the file option (Camera Button) from the job card, from the display click on edit you are taken to the Automation Online Photos upload page here you will see the options in the screen below.



To add photos or files, select the add files option you are now able to navigate your PC and select files for upload.



Once you have made your selection click OK (F12) you can now see a list of your photos and files including thumbnails. You next need to select upload to move the files from your local machine to the web database, as these are uploaded you can see progress bars, if you wish to only upload individual photos or files click on the start option adjacent to the thumbnail and file name.

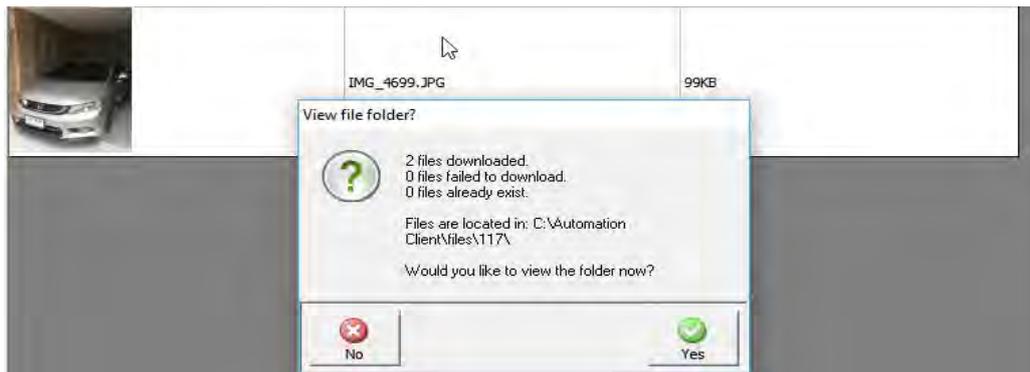


When the files have uploaded you will see a similar screen that has extra options, the ability to select a photo or document for emailing and a delete function against each individual entry. To delete an entry simply select the delete option.



Emailing From The Remote Server: To Email files and text to a client point and click on the checkbox located next to the thumbnail, next select email to client, type the text you wish to send. The client will receive the email displaying the files, your text and contact details that can be used to contact you either via phone SMS or email (we include your email address in the body of the email).

Downloading From Remote Server: Using a remote database allows you to download selected files and store them locally according to job or certificate number. To download a single file or multiples perform the following. Open the job card, click on the files icon (if files are present you will see a red exclamation mark on the icon), from the file display select download the files will be saved on your local drive in C:\Automation Client\Files, the name of the folder will be the job number or the certificate number (if you created one). A message will show you the path, giving you an option to view the folder.



Roadworthy Certificates

Roadworthy, Jobs: Open a new job card for the roadworthy you wish to perform, select the files option, from the files form, select certificate the certificate form will display, type the certificate number into the available field and save using OK (F12). You can now reopen the certificate at any time from the job card via the files option.



Note: Once a certificate is created a red exclamation mark is visible on the certificate option, to upload / download photos and files reference the notes according to your server type.

Ordering Integration

Pro-Link / Repco Integration: Microbase in conjunction with Repco Auto Parts and Coventrys have developed a seamless interface that allows Repco and Coventrys customers to order parts on-line via their local purchasing module. Parts identified by Repco or Coventrys 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 / Pro-Link 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 / Pro-Link.

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

Navigator Interface Settings: To initialise the interface you must be a Repco / Coventrys customer with a valid account that allows you access to Navigator / Pro-Link and Smart Estimate. Currently you will use a site code, username and password to activate the Repco / Coventrys applications, these need to be entered into on-line settings within Automation, when recorded you will have a seamless entry to Navigator / Pro-Link Smart Estimate. The instructions on how to use these ordering systems interfaced to Automation can be referenced from the Help module for Automation Client.

Clocking Onto Jobs

Clocking On / Off Technicians: The on-line job card allows for easy clocking on / off of technicians directly from the selected form. To clock a technician on / off a job select the Clock on/off function located to the right of the task bar under the parts and labour section. On opening you will see the current status of each technician regardless of which job they are currently logged onto.

To clock a technician onto / off of the open job, simply highlight technician's record and select OK, a confirmation screen is displayed. The message will include the job logged off of (if any) and confirm the technician is logged onto this job. Note: it is only possible to log on / off technician for the job that you currently have open.

Clock on/off

Technician	Status
Jake Steyn	Clocked off
Jayne Johnson	Clocked on to Job 135 at 2017-09-05 12:44:18
Johnson Fred	Clocked off
Niall Robb	Clocked on to Job 54 at 2017-09-05 12:23:24
Peter Brooks	Clocked on to Job -1 at 2017-09-05 07:38:28

5 records

Vehicles

Records

From the on-line job card you have full access to the vehicle record, to view the vehicle form tap on the vehicle button located on the bottom task bar.



This option gives you full editing access to all tabs on the vehicle form.

Editing Vehicle Records: To edit simply tap on the down arrow to the right our free type in the fields provided. To view servicing, comments, history and driver information tap on the tab at top of form.

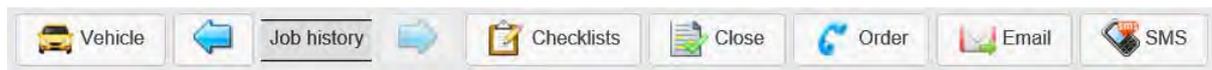
AA Automotives - Vehicle details

Registration: Odometer: Owner:

Vehicle details	Servicing	Comments	History	Driver					
Make:	<input type="text" value="NISSAN"/>	Model:	<input type="text" value="NISSAN MICRA"/>						
Series:	<input type="text" value="ST-I"/>	Engine type:	<input type="text" value="HR15"/>						
Series from:	<input type="text"/>	Month:	<input type="text" value="January"/>	Year:	<input type="text" value="2010"/>				
Series to:	<input type="text"/>	Colour:	<input type="text" value="Blue"/>	Type:	<input type="text" value="Hatch"/>				
Options:	EFI <input checked="" type="checkbox"/>	Auto <input checked="" type="checkbox"/>	Aircon <input checked="" type="checkbox"/>	Pwr Str <input checked="" type="checkbox"/>	ABS <input checked="" type="checkbox"/>	Cylinders:	<input type="text" value="4"/>	Inactive:	<input type="checkbox"/>
VIN No.:	<input type="text" value="MNTFAUK13A000050"/>	Tyre size (front):	<input type="text"/>	Engine cap.:	<input type="text" value="1.5"/>				
Engine No.:	<input type="text"/>	Tyre size (rear):	<input type="text"/>	Seating cap.:	<input type="text" value="4"/>				
Security:	<input type="text"/>	Fuel type:	<input type="text" value="PULP"/>	Doors:	<input type="text" value="4"/>				
GVM:	<input type="text"/>	Radio PIN:	<input type="text"/>	Reference:	<input type="text"/>				

Vehicle History

To view previous completed jobs tap on the arrow to the right of the history option located on the bottom task bar, you can move back and forth by using both the forward and back arrows. Closing date is displayed in red on the upper left hand side of the screen.



Checklists

For checklists to function you must first have a service on the on-line job card that has a checklist attached, to instructions please reference the Automation Premium help system. Checklists are selected by tapping on the option from the bottom task bar.

If the checklist is inactive you are unable to select results for each checked item. Alternately if the checks are active you will have the ability to select whether the item has passed / failed or is not applicable to this particular vehicle by tapping on the required cell.

Note: If most items pass you can select the pass option from the bottom form then simply edit those items that are classified as a fail or not applicable.

On the left hand side of the checklist display you will see a list of checklists attached to services entered on the job card. The table also indicates whether the list is active or inactive.

12:07 pm 91%

microbasedb.com.au

AA Automotives - Job Card 54

AA Automotives - Job #54

Client details
Mandy Marshall
56 Reginald Street
Home: (08) 945856

Parts & Labour

Item	Description
Mjt	Major
1005-21	Engi
ROF1	Oil F
1051-37	Hypc
1031-57	Engi
WYNNS	Wynr
1051-57	Engi
1226-89	Auto
2164	Oil F
Z332	Fuel
GH11	Light
95421	Mast

Add Services

Work done
Remove And Repla
Flush Braking Syst
Remove And Repla
Bleed System, Roa
Remove & Replace
Engine Block, Repl
Cap Operation And
Remove And Repla
Bleed System, Roa
Remove & Replace
Engine Block, Repl
Cap Operation And
Remove & Replace
Engine Block, Repl
Cap Operation And
Remove & Replace
Operation, Replace
System.

Cancel

Checklists

Checklist	Type	Item	Pass	Fail	N/a
Major Service	Active	1. Major Service. Checked	✓		
Carburettor		2. Test Drive	✓		
		3. Road Test	✓		
		4. Driveway Checks	✓		
		5. Air Conditioning*	✓		
		6. Clutch Adjustment*	✓		
		7. Brake Pedal Adjustment	✓		
		8. Hand Brake	✓		
		9. Pedal Pad Condition	✓		
		10. Steering Free Play	✓		
		11. Starter Inhibitor*			✓
		12. Lights Operation	✓		
		13. Headlight Operation	✓		
		14. Park Lights	✓		
		15. Indicator Operation	✓		
		16. Signal Cancellation		✗	
		17. No. Plate Light	✓		
		18. Stop Lights	✓		
		19. Reverse Lights	✓		
		20. Lenses Condition	✓		
		21. Interior Checks	✓		
		22. Instruments	✓		
		23. Interior Light	✓		
		24. Washer Operation		✗	
		25. Wiper Blades	✓		
		26. Mirrors Int / Ext.	✓		
		27. Windscreen	✓		
		28. Heater Controls	✓		
		29. Horn	✓		
		30. Seat Belts	✓		
		31. Lubricate Doors	✓		
		32. Window Operation	✓		
		33. Under Body Checks	✓		
		34. Drain Engine Oil	✓		
		35. Gearbox Oil Level*		✗	
		36. Differential Oil Level*	✓		

Cancel Pass all OK

Total(Incl. PP)

\$200.00	✓
\$38.54	✓
\$6.16	
\$5.59	
\$5.00	✓
\$15.00	✓
\$3.19	✓
\$5.92	✓
\$8.20	
\$44.00	
\$39.11	✓
\$308.00	✓

Clock on/off

ary

	Value
Ex)	\$321.77
ial	\$32.18
ing	\$0.00
nc)	\$353.95

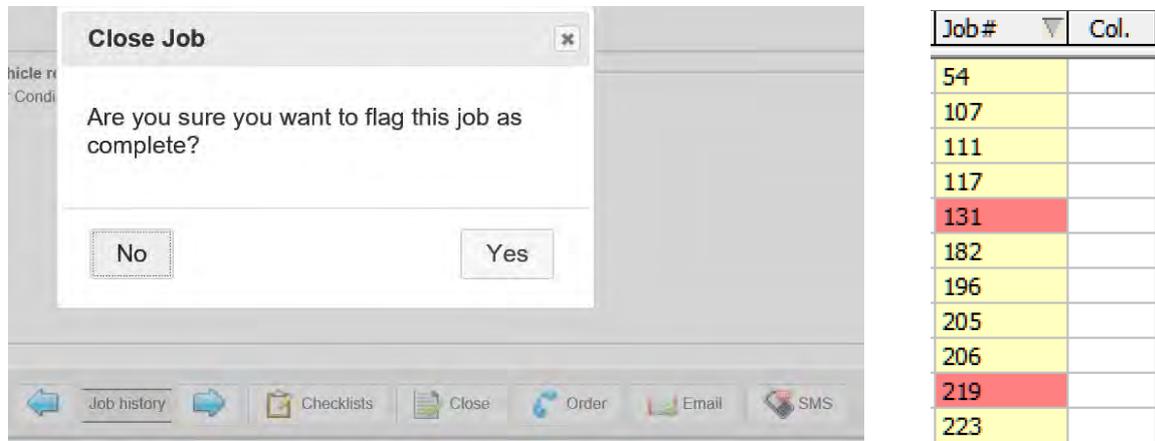
SMS OK

Communication

The remote job card communicates close requests and orders back to the node machine (Admin), it is not possible to close the job on-line however you can initiate a close request so the job close procedure can be performed from any terminal running Automation Client.

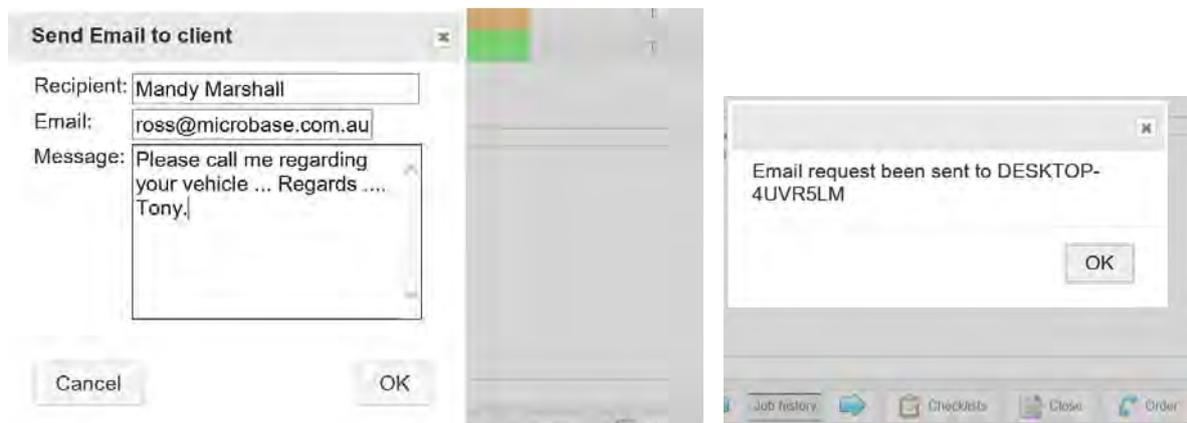
Finalisation

To send a request select the close option from the bottom task bar, from the close prompt request select yes, on this command a request is sent to the main database. To indicate a job is finalised and due to be closed you will see the background colour behind the job number on the diary screen displays in red.



Email

You can email the client directly from the on-line job card, firstly ensure your email settings are correct in your desktop version of Automation client as the email function accesses the node (admin) machine. Tap on the email option from the task bar you will see the recipient name and email address which are recorded on the client form. Type your message into the text field, select OK, a confirmation message is generated which includes the name of the machine set as the node.

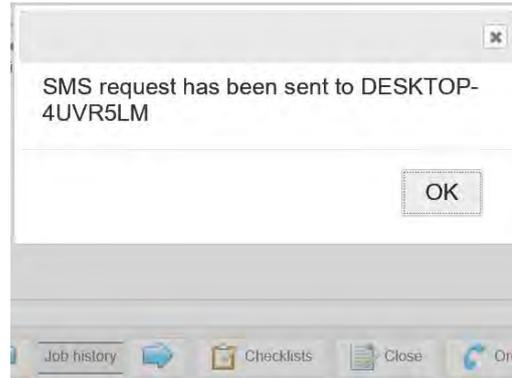
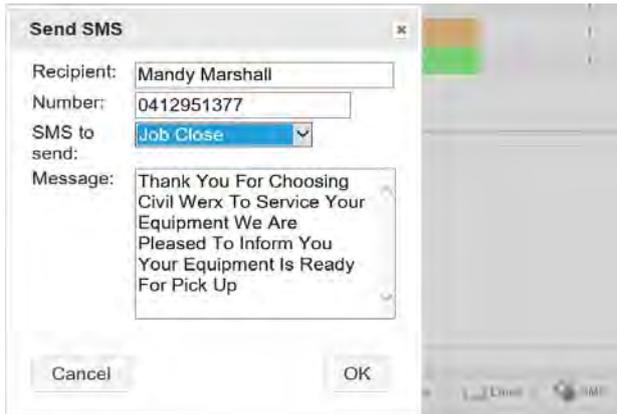


SMS

You have access to SMS functions from the on-line job card, additionally you can access any pre-set message created from your desktop machine.

To send a text message from the bottom menu bar tap on SMS the send SMS form displays from here you can select a pre-set message by tapping on the arrow to the right of the SMS to send field. Alternatively type a message into the text area and select OK.

A confirmation message is generated which includes the name of the machine set as the node.



Orders

Overview

Your on-line job card unlike the terminal does not have purchasing functions it does however have the ability to identify parts that are required (out of stock) and create purchase requests that are transferred to the node (admin) machine for processing.

The orders when actioned from the admin machine will change the status on the job card to ordered, once the items are received and the purchase order satisfied the on order status will no longer be visible for inventory items for buy-ins the status will change to completed.

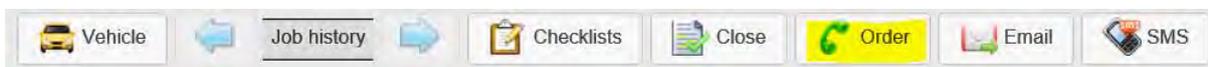
The order request allows a technician to select specific parts to order from a specified supplier, the user has full access to the supplier listing and if required can send multiple orders for each individual supplier.

Creating Order Requests

You can populate the job card with parts from either your parts listing or via the integrated purchasing links via Repco or Coventrys. To generate an order you must have parts that are not available, these are indicated by being flagged as inventory highlighted in red.

Item	Description	Type	Order	Qty
4wdmj	Four Wheel Drive Major Service	Service		12
004-025384	Gasket each Flange	Inventory		1
000005-05	Oil stabiliser 500ml	Inventory		1
000-804	Turbo Hose 28.34"	Inventory		1
008-010584	Gasket gearbox	Inventory		1
008-011394	Gasket-oil Htg	Inventory		1

The parts that are indicated as being out of stock can be added to an order request, the order field is populated once the purchase order is created so the technician knows those parts are in the system awaiting arrival.



To begin the process select the order option from the bottom of the job card, the order request form is now in view, by default all parts are selected, if you do not wish a part to be on this request simply tap on the selection box, the tick is erased. Over to the right you have a quantity option if you wish to order more than the suggested requirement tap on the cell and edit the value.

Supplier Selection: the request can be sent without selecting a preferred supplier, in which case the operator of the admin machine will have to decide from which supplier the parts need to be sourced. If the technician already knows which supplier to use it actually simplifies the process as the admin machine can import the parts straight onto a purchase order without accessing the supplier listing.

Order request for Job 65

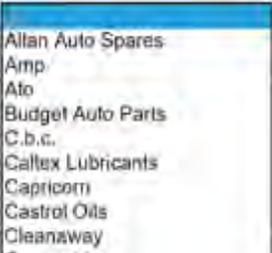
Part number	Description	Qty
<input checked="" type="checkbox"/> 004-025364 25839	Gasket-oth Flange	1
<input checked="" type="checkbox"/> 000005-05 66977	Oil stabiliser 500ml	1
<input checked="" type="checkbox"/> 000-004 72330	Turbo Hose 26314	1
<input checked="" type="checkbox"/> 008-010564 25845	Gasket-gearbox	1
<input checked="" type="checkbox"/> 008-011394 25846	Gasket diff Hug	1

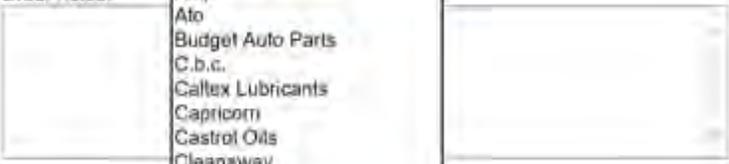
Preferred supplier: ...

Order notes:

Cancel Ok

To select a supplier tap on the arrow to the right of the supplier field, your supplier list displays, scroll down or type the first letter of the supplier name, once the record is located tap to insert into the supplier field.

Preferred supplier: 

Order notes: 

Notes can also be added to the purchase request, this is a free typing field that is meant for extra instruction to the admin staff when ordering items.

Buy-Ins

As previously mentioned it is not possible to place buy-ins listed in parts directly to the job card, they are visible for reference purposes only. If the technician requires a listed buy-in to be purchased he will need to make a note of the part number in the text area and send the request through to admin so the purchase can be processed in the normal way with the part being assigned to the job.

The technician will of course see the item on his job card with the order status indicating ordered, once the part is received and the purchase order converted to a bill the status will change to completed and be highlighted green, the technician then knows the item is available.

Radiator Hose Buy-in Complete

Order requests for items where the part number is unknown will require the technician to use the order request form as a note to the admin machine, a request should include a description of the part required and if known which supplier to source the item from. There is no need to enter the job number as the order request will display this information. The technician should then monitor the job card to ensure the part has indeed been ordered.

Order notes:

Require a water pump and fan belt for this vehicle please order from Coventrys. Also raise an order for part# 65-9874 radiator hose this listed as a previous buy in suggest you use Coventrys

Processing

Receiving Requests: Only the node (admin) machine will receive the order requests, the orders will take approximately 15/30 seconds to transfer. The order request form includes the job number, item, description, job required quantity plus an order notes section.

Parts that are extracted from your listing or via a Repco / Coventrys download from Navigator or Pro-link order if the technician has chosen a preferred supplier the items can be inserted directly to a standard purchase by selecting the order option at the bottom of the form. If no supplier is selected by the technician the admin machine on processing will be presented with the supplier list and a selection is required before moving onto the purchase order.

In the case where no supplier selection has been made it is possible to de-select items from the list and apply only those items to the purchase order. The purchase order will retain the items not selected for allocation to an alternate supplier.

Item	Description	Job Req.
OE 11213-15071	Automatic Transmission Filter Kit	1
OE 11213-76020	Valve Cover Gasket	2
OE 140352S601	Valve Cover Gasket	3

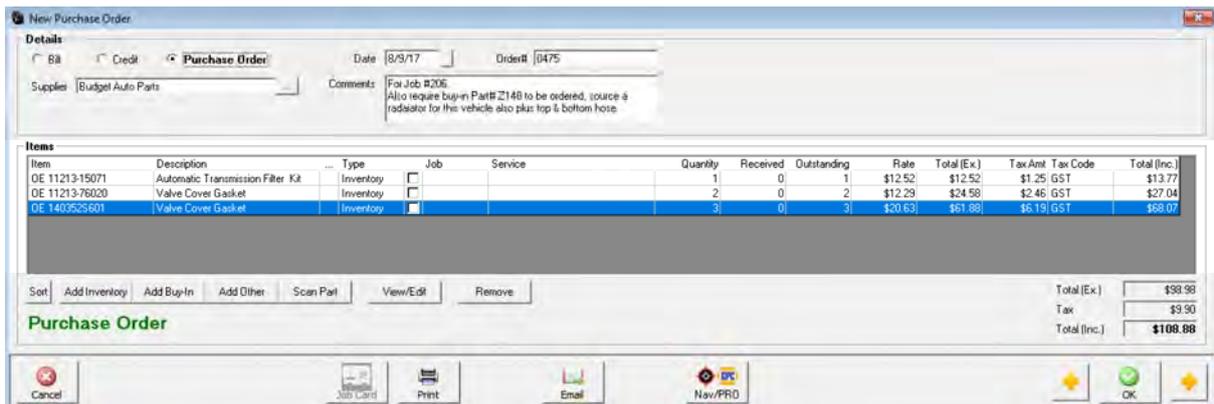
Preferred supplier: Budget Auto Parts

Order notes

Also require buy-in Part# Z148 to be ordered, source a radiator for this vehicle also plus top & bottom hose.

Cancel Order

The order request in the example below has been converted to a purchase order, the order can now be send directly to the supplier or processed via Navigator or Pro-Link.

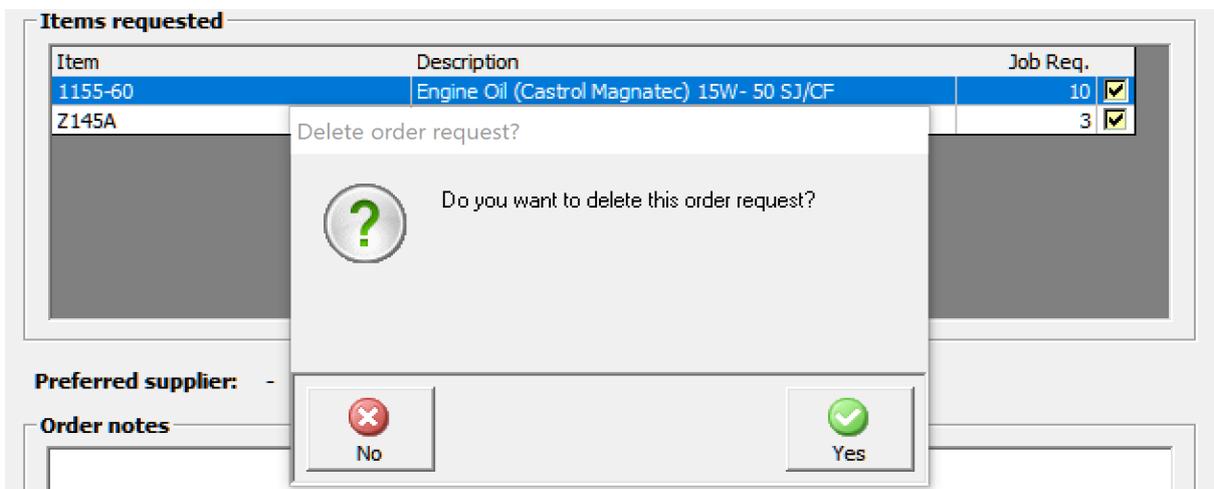


The technician once he refreshes the job card will see the parts are flagged as ordered, once the items arrive and the purchase order is converted to a bill the order status will no longer display on the job card.



Buy-ins need to be processed from the node (admin) machine with the purchase order being allocated to the specific job, the technician can then track progress of delivery. Once a buy-in is processed the status will change on the job card to complete with the background colour changing from amber to light green. The technician then knows the item is available for fitment.

Order Requests, Cancelling: Selecting the cancel option from the purchase request will display a confirmation message, selecting no will place the order back in the que for processing later, yes will delete the order entirely.



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