Client Version 3.5.9 Release Notes

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Client Version 3.5.9 Release Notes

Local Smart Inspector Integration Repco & Coventrys

Overview: The Automation Premium job integrates with Smart Inspector via the Repco and Coventrys ordering systems. Features include the ability to upload client and vehicle information directly to Smart Inspector, link a completed inspection to a job card and monitor job progress plus print, view and email checklists including any attached photos.

Microbase strongly suggests that that all inspections are started as estimates working with this form rather than a job allows the user to download parts from Navigator or Pro-Link, once the estimate is accepted it can be converted to an open job and the parts placed on order.

For sites using the on line job card estimates can be viewed the same as open jobs with exactly the same links available to the technician.

The following instructions use screen shots from Repco, the procedures are exactly the same if you are a Coventrys customer and use the Pro-Link interface, when presented with the options you simply choose Pro-Link instead of Navigator.

Data Interface, Smart Inspector: The first step in linking a Smart Inspection checklist to an estimate / job card is to select the Smart Inspector option from the task bar under the parts and labour section.





On selection you will be requested whether you wish to continue



To move forward confirm with yes



Next you will need to select the supplier interface Navigator or Pro-Link, on selection you will be taken to the create new job screen in Smart Inspector.

S JOB CARDS														
CREATE NEW JO	в													
Step 1: Customer	r Details (optional)								1					
First Name:	Sydney			Last N	iame:	Tong								
Address Line 1:	1 Perina Place			Addre	ss Line 2:				1					
Suburb:	Wilson			State:		WA.			1					
Postcode	6107			Phone		(08) 945178	46		1					
Email Address:				Prefer	red Contact Method	Phone		×						
Step 2: Vehicle De	etails											 	 	
venue Secon		Will Seeron.	Fre	ge orsonn.	🗎 SA 🗸	q	+	5	£1					
SEARCH FILTER	85	Q MAKE 🚔	MODEL -	YEAR	ENGINE		CAR VARIANT							
MAKE P MODEL / YEAR T BODY TYPE (TRANSMISSION /	HONDA ACCOBO EPI 22LVTEC 93/97 1997 COURE AUTO	C ALL NAKES HONDA C	ALL MODELS HSX	1995 1995 1995 1994 1993 1993 1993 1993 1991 SERIES ALL SERIES NA	ALL ENGINES	P3 260 MP7 V6	BODY TYPE 2dr Coupe & Targe	TRANSMISSIC	N DAVE TYPE DALE R	RANGE				
Vehicle				011/0 /04										
Registration	VIN	zer men i vo aspa	odem	eter	01 - 12/04]	olour								
7KK963			8412	23	1	White								
Further Notes														
Check Aircondit	tioning Temperature													
Step 3: Select Ins inspection 42 Point Safety C	pection Check 😒													
							5A	VE & LEOSE						

The form is populated with the client and vehicle details, if the vehicle details are incomplete you will need to "drill down" using the supplier vehicle database to complete the name, model, engine and car variant fields. You can also make notes directly in Smart Inspector by utilising the further notes field, the notes are returned to Automation. Note: you must select what type of inspection is required from the drop down list provided.

To complete the new job card and return to Automation select the save and close option at the bottom of screen.

https://www.microbase.com.au/client/nav3.php		🛛 🕁
	Navigator response received	
	You can now close this window and return to Automation.	

You will need to close the Navigator / Pro-Link screen, select the browser tab X.

Inspection created.	1 A A A A A A A A A A A A A A A A A A A	
-		
	-	
OK		Called Date

On returning to Automation you will see a confirmation message indicating the inspection has been created.

Inspection Status, Smart Inspector: to view inspection status from Automation select the Smart Inspector option from the estimate / job card. From the inspection detail form you can see the status of the inspection, if the inspection is still work in progress this is indicated by incomplete in the status field. The inspection must be finalised in Smart Inspector for the status to change to complete.

A	ion details			
Name	42 Point Safety Check			
Notes	Check Airconditioning Temperature			
Status	Incomplete	- 1		
Report	[

You are now ready to complete the inspection via Smart Inspector and return any parts required back to Automation.

Completing an Inspection, Smart Inspector: Open smart inspector and go to incomplete, you will see a list of

Smart Inspector		INCOMPLETE	COMPLETE				Seringi Thoman 🛓	
Creeted 1	ú. I	Dehalts	Vehicle		Jeb	Assignee	Status	Vew
27/11/2017 07:28 PM	1	7PPL854 Black	HONDA PRELUDE GEN5 BB 2.2L F22Z# DOHC 16v MPFI 4cyl 4sp Auto 2dr Coupe FWD [01/97 - 06/02]		42 Point Safety Check	1	0%	/ Edt / Go
27/11/2017 07:27 PM	3	7PPL854 Block	HONDA PRELUDE GENS BB 2.2L F22Z# DOHC 16v MPFI 4cyl 4sp Auto 2dr Coupe FWD [01/97 - 06/02]		42 Point Safety Check		0%	/ tat / 50
27/11/2017 07:08 PM	3	7PO654 Red	FORD FALCON XW 4.9L 302 cu.in Windsor OHV 16v Carb VB 3sp Auto 4dr Wagon RWD [06/69 - 09/70]		42 Point Safety Check	Gerorge Thornton	0%	/ Edt / Go

Inspections that are work in progress, to complete an inspection select go, this action will open your inspection sheet.

Smart Inspector			7PPL854 - HONDA PRELUDE GENS BB 2 2L F22	Giospy Poerier			
VISIBILITY UNDER BONNET	STEERING & SUSPENSION	UNAX092	TYRES INSPECTION NOTES			- 1250	esimeri (il 😑
,iatu	NIA	Imported.		Action Required		Perts	Options
Biakin		744			li i		-
Front Blake Pads Remains	na (mma	test 🚺	Climp Replice		- 11		٥
Pront Brake Discs Thickne	ss (mm)		No action required		- h		
Reier Broke Pach Semanar			e 3mm - Replace		: h		۵

Complete the inspection sheet indicating what parts are required to fix any items that have failed, in the above example we have failed the disc pads and indicated we need one set of each.

Smart Inspector			COMPLETE				intering Phaselos 🛔
Completed 🐱	Details	Venete			Assignee	Statin	Varier
Rodey OSIDE PM	7000054 (Baca	HONDA PRELIDE SENS 68 2.21 F3228 DOHC No MRT 404 4to auto 2ni Coupel FW3 (01/97-15/82)		42 Pennt Sudiny Charles	Ginardon Tharrithm	005	/Rat / Go @Pret
Today 03:20 PM	7PPL854 Black	HONDA PRELUDE GEN4 88 2.7L H22A# DOHC 16v MPFI 4cyl 4sp Auto 2dr Cospe FWD (01/97 - 06/02)		42 Point Safety Check	Gerorge Thomion	100%	Fint File @Pint
05/12/2017 09:26 AM	AFC034	MAZDA MAZDA3 BM SP25 2.5L PY SkyActiv-G DOHC 16v Petrol direct inj. 4cyl 6op Man 4dr Sedan PW	3 [12/13 - 04/16]	42 Point Safety Check	Gerorge Thornton	100%	de Port

The check is now listed in the completed section and will be downloaded to Automation upon request.

Parts Inserting, Smart Inspector: To insert parts you will need to return to the Smart Inspector job card screen via Automation, select the save and close, if you have indicated on the inspection sheet you require parts Smart Inspector will prompt you to open Navigator / Pro-Link so you can "drill down" to the items you require and return the items to Automation on finalisation these are placed on the estimate / job card.

Home: (08) 94588764	Venide: 94157 Odo: 87421	9 FORD FA	IRLANE						
arts & Labour					-				
Item	Description		. Type	Drde	Quantity	Rate	Total (Ex.)	Tax Amt Tax Code	Total (Inc.) FP
425C	42 Point Safety Check		Service		0.65	\$81.82	\$54.55	\$5.45 GST	\$60.D0 T
D811085LP	Silverline Brake Pad Set				1	\$57.99	\$57.99	\$5.80 GST	\$63.79
DB10M88.P	Siveline balle Pad Set		Inventory		11 10	\$57198	857.49	\$4.60 GST	(61.7)

Completed Inspections Viewing: To view / print a completed list from Automation select inspector and let the completed inspection sheet download, you will see the status has changed to completed plus you have a reference URL in the report field – this represents the link Smart Inspector has created to store the inspection. To view select the yellow folder to the right of the report field, depending on how your machine is set-up you should next see a screen indicating where the report has been saved on your local machine, this is usually downloads.

Select open from the options and you will be able to view / print the report from your PDF viewer.

Inspectio	on details	×					
Name Notes	ion details 42 Point Safety Check please check brakes	= 1					
Status Report	Complete [http://tinyurl.com/y6uftsah						
	Inspector	Done	O BPC Inspecto	Nav/PRO	On/off	Labour	Report
View D	ownloads - Internet Explorer			_		- C	x c
View a	nd track your downloads		Searc	h download	s		\$
Name		Location		Actions			
Job rtin	Card_1257pdf 111 KB spector.rauuat.gpcasiapac.com	Do you want to op save this file?	en or	Oper	n []	Save	×
Job rtin	Card_1285pdf 111 KB spector.rauuat.gpcasiapac.com	Do you want to op save this file?	en or	Oper	1	Save .	-

From the view downloads form you can also choose to save the file to another folder if you wish, any photos that were attached via Smart Inspector will be referenced at the bottom of the report.

Emailing Inspections, Smart Inspector: Emailing a job summary, estimate or invoice that has a completed inspection attached will result in the link to the inspection being inserted in the form PDF. Your client simply needs to point and double click on the link to view.

Job Summary

Inv. No. 58	Date 11/12/17	Order No	Sales ID -				
Clier	t Details	Vehicle Details					
Belmont Sa 32 Austin A Kenwick W.	Ivage Yard venue A 6107	Registration: 7PO654 Odo: 6621 Make/Model: CHRYSLER PT CRUISER Type: Sedan Year: 2000 Next service: Log Book Service 60,000km Due: 8/6/18 Kms: 76212					
Account 19	Home -	Work (08) 94594448	Mobile -				

Inspection report: http://tinyurl.com/yc8pcsvj

	Services, Parts & Labour										
Qty	Description	Unit Price	Total (Ex)	Tax	Total (Inc)						
1	Log Book Service 50,000 Km	\$400.00	\$400.00	\$40.00	\$440.00						
1	Castrol (TRANSMAX Z) Dexron II / III	\$13.04	\$13.04	\$1.30	\$14.34						
1	Manual Trans Oil (Castrol VMX 80) 75W-80W GL4	\$6.60	\$6.60	\$0.66	\$7.26						
	Vehicle Re	eport									

Online Job Card Smart Inspector

Overview: The Automation Premium online job integrates with Smart Inspector via the Repco and Coventrys ordering systems. Features include the ability to upload client and vehicle information directly to Smart Inspector, link a completed inspection to a job card and monitor job progress plus view completed checklists including any attached photos. Note: That if you wish to email the checklist link to a client this must be done from a terminal.

For sites using the on line job card estimates can be viewed the same as open jobs with exactly the same links available to the technician.

The following instructions use screen shots from Pro-Link, the procedures are exactly the same if you are a Repco customer and use the Navigator interface, the job card will present both options (if setup) you simply choose Navigator instead of Pro-Link.

Data Interface

Your online job card has direct links to Smart Inspector, if you have both options completed in site settings / online (admin machine) you will see links to both interfaces, if only one is selected you will have one choice. To upload client and vehicle information point and click on inspector a confirmation message displays, select yes to proceed.



Create inspection? x X Memory Would you like to create an inspection for this vehicle? File File File No Yes File Toutfield File	QIV 0	Rate S0.80	Total(Ex) \$0.00	100 \$0.00 0.51			Totel(inc) S0.00	FF D
Create inspection? x Would you like to create an inspection for this vehicle? Image: Create an inspection for this vehicle? No Yes				(63)	GPC Inspector	INCLINE Ø Inspecto	Neverator	Clock on/off
Would you like to create an inspection for this vehicle? Image: Comparison of the second of the se		Create inspection?	×	10	Summary		Ť	Value
Would you like to create an inspection for this vehicle? Image: Create an inspection for this vehicle? No Yes		oreate moperation.		Add	Total(Ex)			\$0.00
No Yes		Would you like to create an inspection for	this vehicle?		Tex Total			50.00
No Yes			and contained	Edit	Rounding			\$0.00
		No	Yes		[10/8/(IVC)			\$0.00
C Oddar Alfons Linear SMS	C Order	Notos La Linus SMS						00

Step 1: Customer Details (or	otional)								
First Name:	Earl		1	Last Name:		Reid			
Address Line 1	1 Petrel Close			Address Line	2	1			
Suburb	Milson			State		14/4			
Suburb.	WIISON			State.			20		
'ostcode.	6107			Phone:		(08) 9458820	19		
Email Address:				Preferred Cor	itact Method:	Phone		V	
Step 2: Vehicle Details									
Vehicle Search		VIN Search		Rego Search	🗎 WA 🛩	D. SCHICH	NEW SEINISCH	SEAVER HESTERY	
маке 🚝	MODEL 🚗	YEAR	ENGINE	-	CAR VARI	ANT			
HYUNDAI	CETZ .	2010	ALL ENGI	NES	BODY TYP	E TRANSMISS	ION DRIVE TYP	PE DATE RANGE	
MAZDA	120	2009	2.2L D4EB	SOHC 16v Turbo Diesel Inj. 4cy	4dr Sedan	5sp Auto	FWD	11/05 - 12/11	
MITSUBISHI	130	2008	3.8L GEDA	SOIIG-PB 24y MPFI V6					
NISSAN	IL OAD	2007							
SUBARU	IVOE	2006							
ATOYOTA	CANTA FF	2005							
	SANTAFE	2003	~						
ABARTH	TUCSON								
ALEA ROMEO		SERIES							
ADUSTRONG SIDDELEY	BUS								
ACIA MOTODO	GRANDEUR	ALL SERIES							
ASIA MOTORS	HD-SERIES	TG							
ASTON MARTIN	140								
ATKINSON	145								
ATLAS COPCO	MAX								
AUDI	CONATA								
AUSTIN	V SOIMANA N	/							
ALIOTIKI DE ALESI	TIBURON								
/ehicle	TO SAL PEDA DOM	LITE TAL LAD	CI VAL SAD AN	o 111 Coston E3A/D 134/05	+574+1				
Registration	VIN	The Price Line Inte	er vo sap en	Dometer	Colou	r			
GENERATOR	1			84500	Silve	r			
Further Notes	, i						_		
1010100 1 100000 ·						1			
Step 3: Select Inspection									
nspection	1.1								
13 Point Safety Check	×								
the contraction of contracts	the second se								

In Smart Inspector / Job Cards select the correct vehicle make, model, year, engine and variant, select the type of inspection you wish to perform, finalise with save & close. The inspection is now created listed in the incomplete section of Smart Inspector jobs, Pro-Link (or Navigator) will now close and return you to the Automation online job card.

RSA expiry: Next service:					
City	Rate	Tatal(Ex)	Тах		Total(inc) F
0	\$0.00	\$0,00	\$0.00 GST		\$0.00 E
			50	TROLink Ø Inspector	Navigator 📑 Clock on/off
				Summary	
	Inspection details	×	8	ltem	Valu
	Name do Datat Cataturo basis		Add	Total(Ex)	\$0.0
	Name 42 Point Safety Check			Tax Total	\$0.0
	Notes		Edit	Rounding	\$0.0
	Status Incomplete			Total(Inc)	\$0,0
	(
	Inspector	Done			

Clicking on the inspector option once an inspection is in progress will display the check title, notes and status, selecting inspector from this message will take you back to the job card information.

Returning Lists & Parts

C BRO Link 2.	E IN LADOR. TO DUDNICATION OF THE IN GRAPH ONE ASSOCIATE ON SALARS FOR SHORT MUTICES. TON			áten tije 🛔
VISIBILITY UNDER ROWINE'T STEEDING & RUSPERSION UPWINE TYPES	INSPECTION NOTIS			
Jab NA	i isaachd Actor/Reprod		Rate	Quiens
Toley				
i ram Unio Paos Konwang jang	Mes 🔟 Cimm Worker	-))		0
Prairi Baka Casa Triconas (non	Seationaged	- h	- 44	
Ren Bula Data Remoting (mr)	fee 100 cana. Begiere	- k		۵
New Unice Discs Etic interaction(The topological	· 10	-	0
Publics Bake Coloration capes	The The Weathingtool	- 5		8
their Brane Dess	w Nettongret	-1	41	۵

You now need to log into Smart Inspector select the incomplete list find the check and complete including the selection of any parts required.



It is important that you return to Smart Inspector from Automation once the checks and parts selection are complete, this action will return the completed checklist to the job card plus allow you to move into Pro Link (or Navigator) to return the selected parts back to the job card / estimate. If parts are attached to a checklist you will see the message above select OK to return the parts.



When you have completed your parts selection choose return parts to from the Pro Link / Navigator display. The parts will be paced on the job card / estimate and the status of the check will change to complete.

Rego HYUNDAL GRANDEUR Odo 0 Loyalty Points 0 RSA expiry. Next service.								
Order	Qity	Rate	Total(Ex)		Tax		Total(inc	FP
	0	.\$0.00	\$0.00		\$0.00 GST		\$0.0	
	1	\$81.82	\$81.82		\$8.18 GST		\$90.0	
	1	\$105.78	\$105.78		\$10.50 GST		\$116.3	
	1	\$66.35	\$66,35		\$6.64 GST		\$72.0	
				68	OPC Inspector	CPC PROLink	Inspector O Navigator	Clock orvoll
	Inspection	details		×	Summary			
	Nama	12 Point Safaty Chack		18	Item			Value
	Inditic	42 Folint Salety Check		And	Total(Ex)			\$253.95
	Notes				Tax Total			\$25.40
	Status	Complete		Edit	Rounding			\$0.00
	Report	http://tinyurl.com/y88lyfqo			Total(Inc)			\$279.35
	Inspector		Done					

To view the checklist select the report link from the inspection details display, depending on how your system is configured you may be requested to view or save the file.

Estimates Online Job Card

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. Jobs that are on hold are indicated by an ochore backgound in the job number field.

Refreshing

Changes within your diary screen will only be refleced on this screen when the page is refreshed. Ie: 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 acced by the device.

ob#	Client	Rego	Make/Model	Service	Finish	Service advisor
	Kenwick Child Care Centre	9YU741	FORD CORTINA	Four Wheel Drive Major Service	1/6/2017 5:00pm	
D	Kenwick Child Care Centre	9YU741	FORD CORTINA	Brake Bias Adjustment	12/10/2017 5:00pm	
	Riseley, Charlie	9RT874	Ford Fairlane Au 4.0/ 98/00	Air Conditioning Service	12/10/2017 5:00pm	
	Vanderwacht, Lindsey	711712	ALFA ROMEO 75	42 Point Safety Inspection	23/11/2017 5:00pm	
3	Turner, Robert	700123	HOLDEN APOLLO	62 Point Safety Inspection	13/12/2017 5:00pm	
	Reid, Earl	GENERATOR	HYUNDAI GRANDEUR	42 Point Safety Inspection	13/12/2017 5:00pm	
2	Proctor, Diane	7KL556	ALFA ROMEO GTV6	42 Point Safety Inspection	14/12/2017 5:00pm	
5	White, Harry	700821	FORD FALCON	Log Book Service 110.000km	14/12/2017 5:00pm	

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 the cursor will move to an open job that has a field matching that criterea in the client field.

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

Service Advisor: To search for jobs or estimates created by a specific service advisor click on the arrow to the right of the service advisor field, point and double click on your selection, only jobs assigned to that advisor are now visible.

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.

Estimates: You can change to estimates view by selecting the down arrow to the right of the jobs to show field, once the estimates screen is displayed you can choose to view estimates created within the last 30 days (default) last 60 or last 90.

	Open jobs		-	
	Estimates			
Search:	Jobs to show	v: Open jobs 🔽 Servie	ce advisor: All	Local lime: 14-12-2017 15:57 Timezone: -420
	Last 30 (days	~	
	Last 60	days		
	Last 90	days		
Search:	Jobs to show:	Date rat .: Last 30 days	Service advisor:	Timezone: -420 Local fime: 14-12-2017 15:58

To open an estimate simply point and double click on the record in the estimates list.

The estimate form has exactly the same functionality as the online job card.

Booking Form

Overview: For users storing data remotely Automation allows the use of a digital job card that can be accessed from ant mobile device via a web browser. The form is intuitive enough to check whether a record already exists by warning the user. The digital form is designed to be given to the client to complete the basic details, vehicle information can be finalised by the service adviser and submitted to the core database.

Setup, Online Booking Form: For a site to use the online booking form they must be storing their data on the Microbase server and running version 3.5.9 client or later. It is essential that you give your user permissions to access the online booking form from settings / database settings / manage users. To gain access securely you must have users listed flagged for access to the online booking form, the option exists at the bottom of the user profile display.

Container preventer payment Till drawer Orline job card Orline booking form Block all	
U	

There is no need for manage users to be selected as long as users exist with the online accesses flagged to true they will be able to login to the various forms using their individual password.

Accessing, Online Booking Form: The access point is: <u>http://www.microbase.com.au/booking</u> You will see the familiar login screen, select your site, user and password to open the form.

Database:	A1 Microbase Test Data	
Jsen	Admin	÷.
Password:	***	

On gaining access you will see a form that emulates the paper booking form that you have used previously, most fields are free typing with others accessing your database to make data entry much easier.

And a second matrix grant of Finher Finher and the second matrix grant of finher and the second matrix s	ent details Phone Permine	Denier Ma
Sectored Prote name The Low Prote name The Low Contact (baceman) Prote name Output (baceman) Prote name Prote name Output (baceman) Prote name Prote name Prote name Output (baceman) Prote name Prote name<		Te Brinde - AB-
The bill Prist name Able (Business): Prister (beend): Able (Business): Prister (beend): Balle (Business): Prister (beend): Balle (Business): Prister (beend): Balle (Business): Prister (beend): Balle (Business): Balle (Business): Balle (Business): Balle (Business): Balle (Business): Balle (Business): Balle (Business): Prister (Business): <td< td=""><td>Survenez/racing name: Porses</td><td>a Privita a Privita</td></td<>	Survenez/racing name: Porses	a Privita a Privita
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Address: 14 Sumitive Street: Status: Presentation Status: Presentati	Fax. 0412367546	Email John@szemailcom.au
Balanchi Freenantei Balane WA Pontacose: Bit G3 Ander and Anders Balane WA Proprie 184. CARA-CABB DOH'C 197 Turbeo general direct hay - 4-oyt Marke WD: Ver: 2013 Cohen Beer: Enquerer: EP Aulo Akono Pru-Stil AABS of Fyerri Desemble Dom't Turbeo general direct hay - 4-oyt Wink 6464432122345 Tyre stars: Enquerer: EP Aulo Akono Pru-Stil AABS of Fyerri Desemble Dom't regione cap: Enquere No: Puertyne: UEP Intertyne: UEP Intertyne: General Dom't regione cap: Enquere No: Puertyne: UEP Intertyne: Turbeo general direct hay - 4-oyt Mont Hegenany UNICE 2013 Cohen Beerry cap: Enquere No: Puertyne: UEP Intertyne: Turbeo general direct hay - 4-oyt Mont Hegenany UNICE 2013 Cohen Beerry cap: Enquere No: Puertyne: UEP Intertyne: UEP Intertyne: Puertyne: Pueryne: Pueryne: Pueryne: Pueryne: Pueryne: Pueryne: Pueryne: Pueryne:	Address 34 Sunshine Street	
helica details Reprint in: Finds Odometic: Finds Note Image: Sinter: Finds	Suburb: Framantie State: WA	Ponteode: 61 63
Registration: Fighted Obdometer Figure Registration: Figure Registration: Figure Registration: Figure Registration: Figure <td>hicle details</td> <td></td>	hicle details	
Mare Mare Mare Mare Mare Mare Trace States Month Experie Talk CLSA.CLSB DOA't for Yuthoo patient disection (appendix) Month Experie Trace States Experie Fall CLSA.CLSB DOA't for Yuthoo patient disection (appendix) Experie Experie Trace States Experie Experie Trace States Experie Experie Experie Experie Experie Experie Experie <t< td=""><td>Registration: FgH456</td><td>Odometer: 67000</td></t<>	Registration: FgH456	Odometer: 67000
Muniti Yeer 203 Colum Res Trace Equipment: EFF A Lab A Allo Prov 5 tr A ABS of yeer and Second Columnation Second Col	Make AUDI Model A3 Series BVS	Engine: 1 BL CJSA,CJSB DOHC 16v Turbo petrol direct inj. 4cyl
Equipment: • F.P. • Auto • Auto: • P.v. 51: • AUS: • P.y. 10:	Month: February Year: 2013 0	oloun Red Type: Sedan
Vn Nill 4554433272345 Tyre states Senting cap: Engine No: Puert type: Puert type: ULP Ignition twy Next regio due: Concernational Diagnosis Service 1 2 Point Safety Inspection Service 2 & Conditioning Diagnosis Service 3 Image: Service 3 Service 4 Image: Service 3 Service 5 Image: Service 3 Service 6 Image: Service 3 Service 7 Image: Service 3 Service 6 Image: Service 3 Service 6 Image: Service 3 Service 7 Image: Service 3 Service 7 Image: Service 3 Autorisation Service 7 Service 7 Image: Service 3 Service 7 Image: Service 3 <td>Equipment: #EF) #Auto #Aircon #Pw/ Str #ABS #Hybrid</td> <td>Cvlinders:</td>	Equipment: #EF) #Auto #Aircon #Pw/ Str #ABS #Hybrid	Cvlinders:
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Data Entry, Online Booking Form: If you are entering a new client select new at the top of form, continue down to the vehicle and booking information ensuring that you select at least one service from your listing.

When entering a booking for an existing client all you need to enter is the following information to complete the booking:

New / Existing: Existing Surname / Trading Name Private / Business First Name (if not a business) Registration Service / Services Authorisation Vehicle availability

Automation will access the client and vehicle details already on file

To finalise the booking process select OK from the bottom of form.

Open client on your terminal and you will now see the booking on your diary for the date specified, you can of course add information in the usual way to the booking form if you wish.

Kennick Child Care Centre	9/1/741	HOLDEN COMMODORE	70	Brake Bias Adjustment	
Riseley, Charlie	9RT874	Ford Fairlane Au 4.0 98/00	71	Air Conditioning Service	
Vanderwacht, Lindsey	777712	ALFA ROMEO 75	74	42 Point Safety Inspection	
Tong, Sydney	70(963	HONDA NSK	77	42 Point Safety Inspection	
Vincent, Peter	ABC 123	HOLDEN COMM. VS. V6 EP1. 95/96	78	Efi Major Service	
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Online Reports

Overview: Sites that are accessing data remotely have access to two "top level" reports online that can be run over any date selection. Information contained in these reports summarises activity over the chosen period so management can get an overview of what has occurred on site.

Online Reporting, Setup: Firstly your user will need to have access setup in settings / database settings / manage users. To gain access securely you must have users listed flagged for access to the online reports, the option exists at the bottom of the user profile display.

Online job card Online booking form Online booking form	Block all	
Charle reports		

Accessing, online reporting: The access point is: http://www.microbase.com.au/reports You will see the familiar login screen, select your site, user and password to open the report selection.

Automation Online Reports Login				
Database:	A1 Microbase Test Data	Ŧ		
User:	Admin	•		
Password:	•••			
	Login			

Online Reporting, viewing: The opening screen allows you to select the report type and from to date range, once your selections are complete point and click on run.

Microbase T	est Data - Reports		
Report type: Date range:	Financial summary KPI report 01/12/2017	lo 11/12/2017	_

Financial Summary The financial summary displays a "snap shot" of your financials for a selected period, including your average daily operating costs and daily average net profit. The report also totalises your key asset and liability accounts as of the last day of the report period

KPI Report Displays Profit and Loss, gross profit ratios and productivity by technician

Diary Screen

The diary screen contains two new features:

Estimates, Quick Search, Create: A new Estimates selection is available from the top task bar



On selection there are 2 x choices create which will take you directly to the client list and view which opens the sales screen in estimate view with the months estimates displayed, to view an alternate date range select the period or date options from the top of screen.

Jobs, On Hold Option: Version 3.5.9 introduces a new on hold option, a new selection is now available from the top of the diary screen titled on hold, if you do not wish to view jobs that are on hold simply deselect the option.

			18 C	Tech	Avail.	7.6	V	Booking		oan
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Booking	Loan Car	Print	Note	nine	Rem.	7.6		Closed		n hold

Jobs, Placing A Job On Hold: To flag a job as on hold select the note cell from the diary screen to the service description column you will see on the job comments form there are two options one flagging the job for closure the other allows you to place the job on hold.

Booking Comments		х
Comments		-
Pickup at 3.00pm	^	
	~	
🔲 To be closed	🔽 On hold	

Your selections can be reversed by reopening the booking comments form and deselecting your to be closed or on hold options.

Multi Form Access Monitoring

Overview: Since the release of the online job card we have had reports of users proceeding to use forms that are open multiple times, on any network system it is not possible to retain the data from all openings so if a user decides after being warned on opening the job card or other form to proceed a constant warning is displayed on both remote and local forms. We strongly advise that a user does not move forward with any data entry after receiving the initial warning.

From now on a message will constantly warn and identify the other users on both remote and local devices

Local Client – Multi Access Warning

Automation	Client 359	
	Note: This record is currently being accessed by 1 other user: [ROSS-SAMSUNG] Any changes you make may not be saved.	^
		~
	ОК	

Online Job Card - Multi Access Warning

Work done	Note	х —			
	Note: This record is currently	Note: This record is currently being accessed by 2 other users:			Value
	[ROSS-SAMSUNG]	[ROSS-SAMSUNG]		Total(Ex)	\$594.43
	[DESKTOP-4UVR5LM]	[DESKTOP-4UVR5LM] Any changes you make may not be saved.		Tax Total	\$59.44
	Any changes you make may i			Rounding	\$0.00
		C	к		

Nork done	Vehicle report	Summary	
8	8	Item	Valu
Add	Add	Total(Ex)	\$594.4
		Tax Total	\$59.4
Edit	Edit	Rounding	\$0.0
and stre		Total(Inc)	\$653.8
Accessed by 2 of	other users: [ROSS-SAMSUNG], [DESKTOP-4UVR5LM]	Email	

Online Job Card and Local Client - Multi Access monitor will be seen at the bottom of screen

Note: Ignoring these warnings and monitors will result in data loss