

Client Version 3.5.9 Release Notes

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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



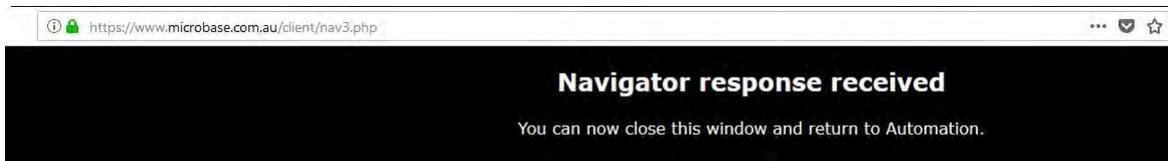
To move forward confirm with yes



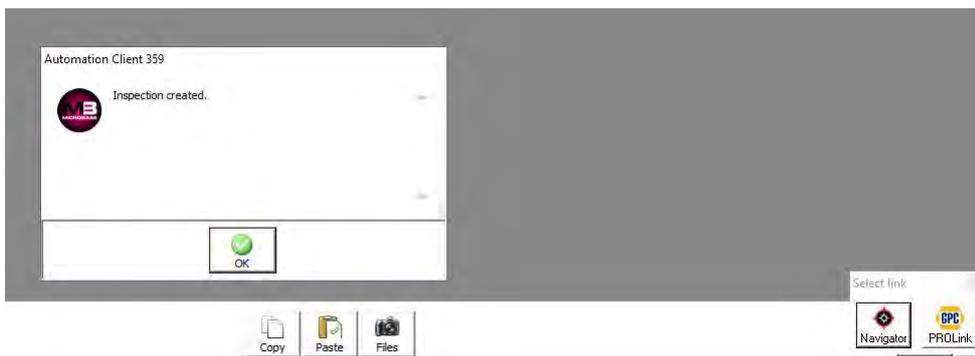
Next you will need to select the supplier interface Navigator or Pro-Link, on selection you will be taken to the create new job screen in Smart Inspector.

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.

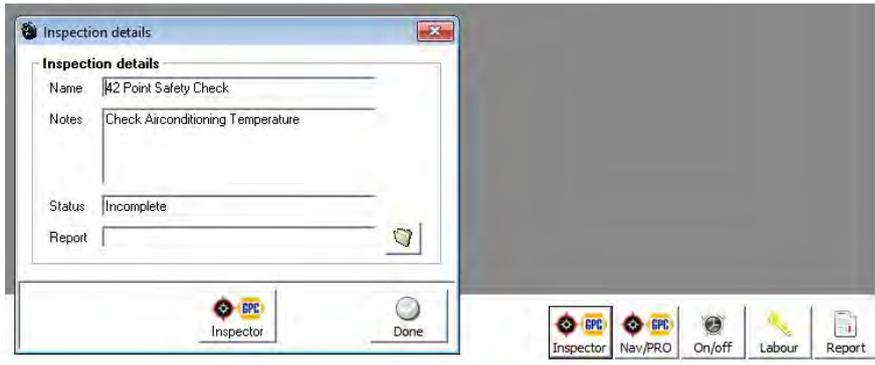


You will need to close the Navigator / Pro-Link screen, select the browser tab X.



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.



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

Created	Details	Vehicle	Job	Assignee	Status	View
27/11/2017 07:28 PM	7PPL854 Black	HONDA PRELUDE GEN5 BB 2.2L F22ZF DOHC 16v MPFI 4cyl 4sp Auto 2dr Coupe FWD [0197 - 06/02]	42 Point Safety Check		0%	✎ Edit ✎ Go
27/11/2017 07:27 PM	7PPL854 Black	HONDA PRELUDE GEN5 BB 2.2L F22ZF DOHC 16v MPFI 4cyl 4sp Auto 2dr Coupe FWD [0197 - 06/02]	42 Point Safety Check		0%	✎ Edit ✎ Go
27/11/2017 07:08 PM	7P0654 Red	FORD FALCON XW 4.9L 302 cu.in Windsor OHV 16v Carb V8 3sp Auto 4dr Wagon RWD [06/69 - 09/70]	42 Point Safety Check	George Thornton	0%	✎ Edit ✎ Go

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

Job	N/A	Inspected	Action Required	Parts	Options
Front Brake Pads Remaining (mm)	<input type="checkbox"/>	Fail	< 3mm - Replace	Add	🔒
Front Brake Discs Thickness (mm)	<input type="checkbox"/>	Pass	No action required	Add	🔒
Rear Brake Pads Remaining (mm)	<input type="checkbox"/>	Fail	< 3mm - Replace	Add	🔒

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.

Completed	Details	Vehicle	Job	Assignee	Status	View
Today 05:01 PM	7PPL854 Black	HONDA PRELUDE GEN5 BB 2.2L F22ZF DOHC 16v MPFI 4cyl 4sp Auto 2dr Coupe FWD [0197 - 06/02]	42 Point Safety Check	George Thornton	100%	✎ Edit ✎ Go 📄 Print
Today 03:20 PM	7PPL854 Black	HONDA PRELUDE GEN4 BB 2.2L H22AF DOHC 16v MPFI 4cyl 4sp Auto 2dr Coupe FWD [0197 - 05/02]	42 Point Safety Check	George Thornton	100%	✎ Edit ✎ Go 📄 Print
05/12/2017 09:26 AM	AFC034	MAZDA MAZDA3 BM SP25 2.5L PY SkyActiv-G DOHC 16v Petrol direct inj. 4cyl 6sp Man 4dr Sedan FWD [12/13 - 04/16]	42 Point Safety Check	George Thornton	100%	📄 Print

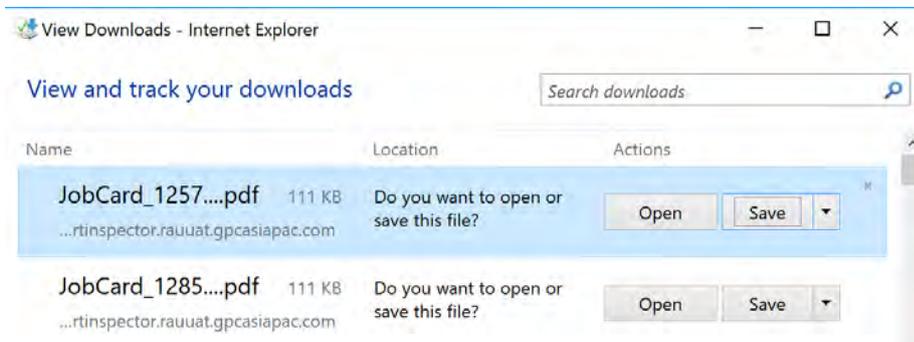
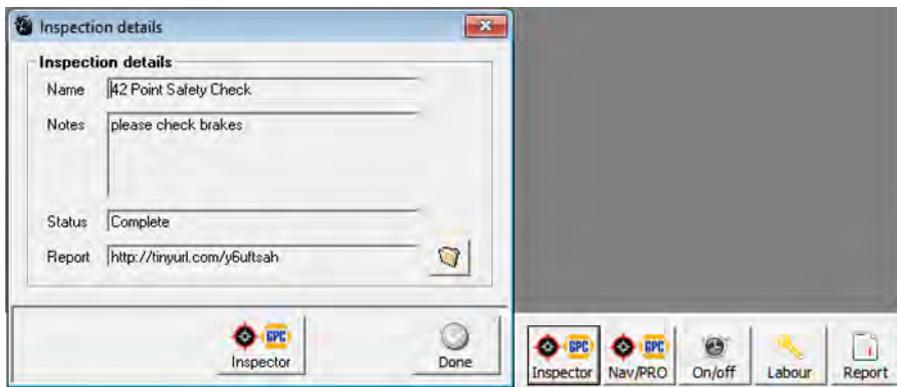
The check is now listed in the completed section and will be downloaded to Automation upon request.

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.

Client Details		Vehicle Details								
Charlie Rooley 24 Sydenham Street, Beckenham WA 6107 Home: (08) 94588764		Vehicle: 9RTS74 FORD FABRIANE Ddo: 87421								
Parts & Labour										
Item	Description	Type	Order	Quantity	Rate	Total (Ex.)	Tax Amt	Tax Code	Total (Inc.)	FP
42SK	42 Point Safety Check	Service		0.65	\$91.82	\$59.55	\$5.45	GST	\$65.00	
D811083P	Silverline Brake Pad Set	Inventory		1	\$57.99	\$57.99	\$5.80	GST	\$63.79	
D810802P	Silverline Brake Pad Set	Inventory		1	\$57.99	\$57.99	\$5.80	GST	\$63.79	

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.



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 -
Client Details Belmont Salvage Yard 32 Austin Avenue Kenwick WA 6107		Vehicle Details Registration: 7PO654 Odo: 66212 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 -
Work Done			

Inspection report: <http://tinyurl.com/vc8pcsvj>

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 Report

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.

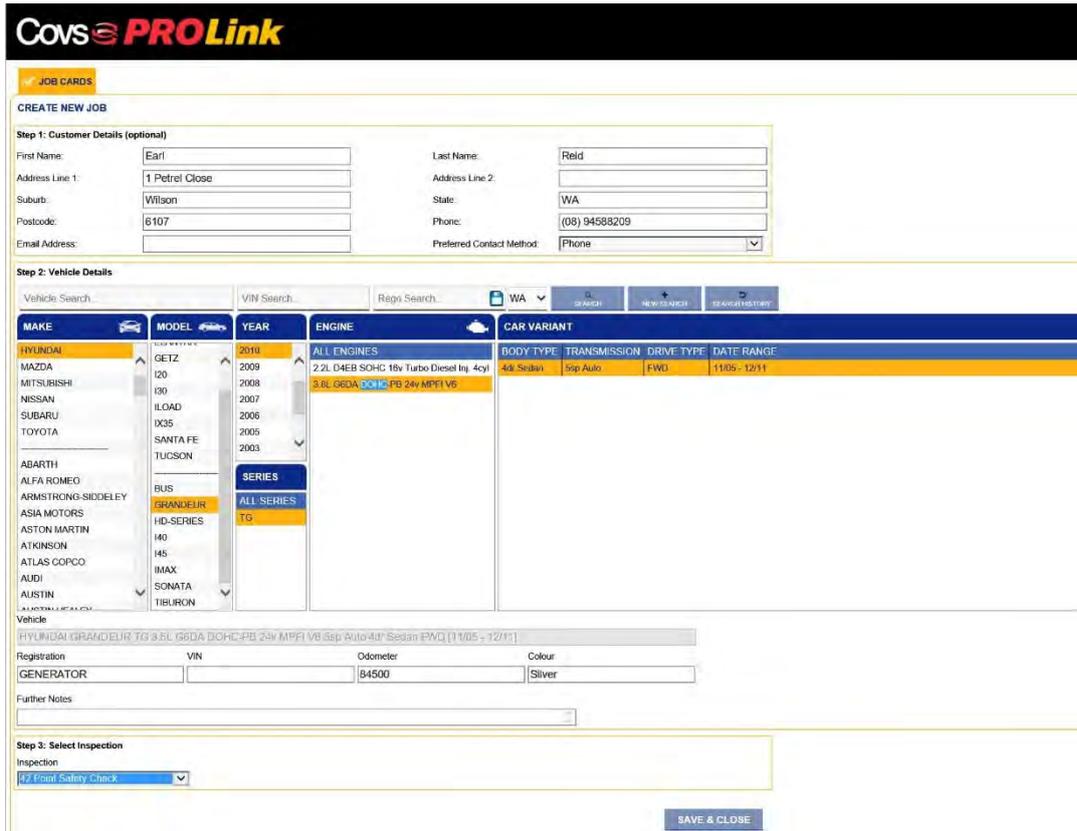
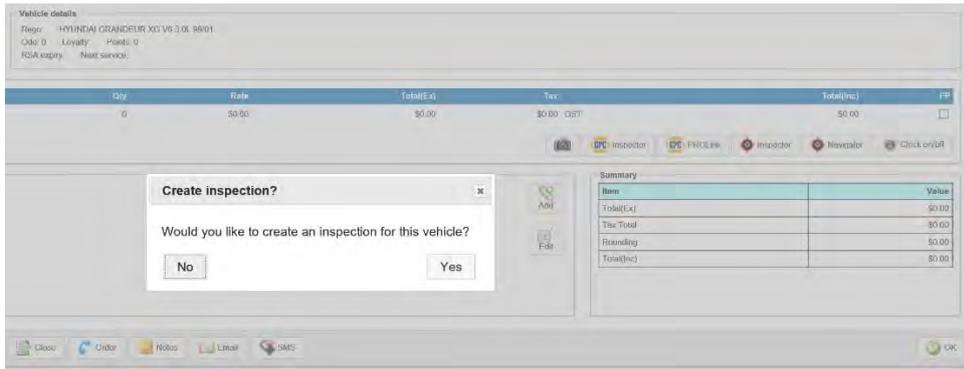
For sites using the on line job card estimates can be viewed the same as open jobs with exactly the same links available to the technician.

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.

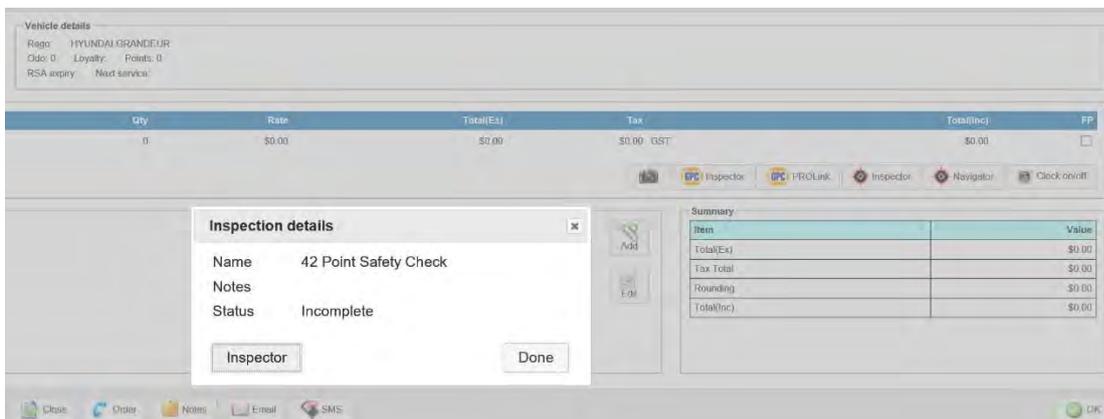
Data Interface

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.





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.



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.

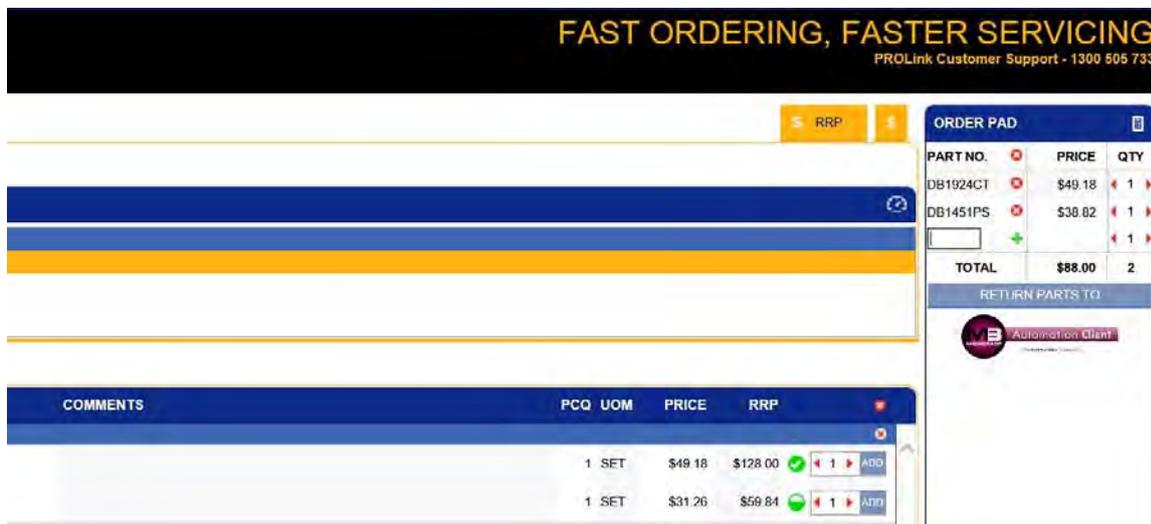
Returning Lists & Parts



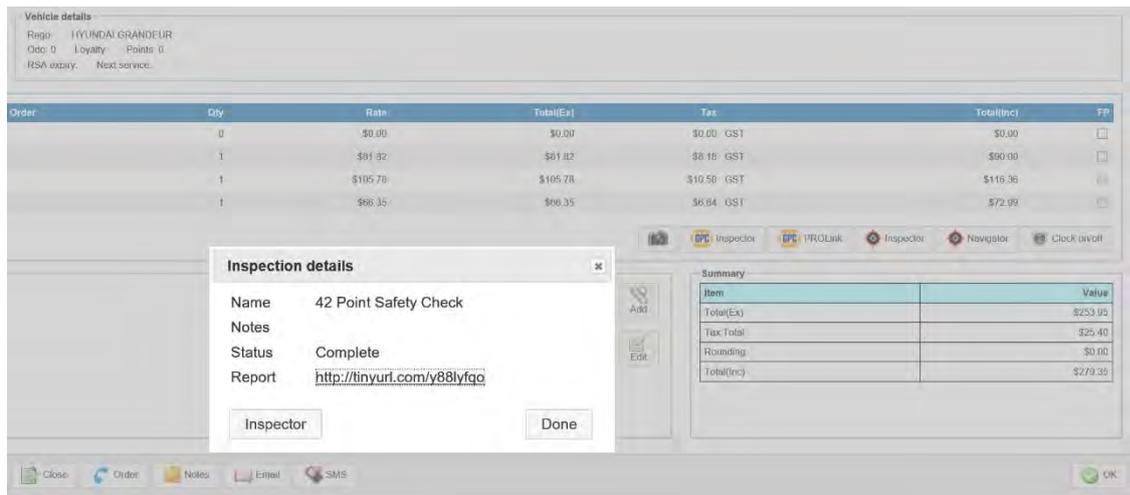
You now need to log into Smart Inspector select the incomplete list find the check and complete including the selection of any parts required.



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.



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 background in the job number field.

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.

Job#	Client	Rego	Make/Model	Service	Finish	Service advisor
65	Kenwick Child Care Centre	9YU741	FORD CORTINA	Four Wheel Drive Major Service	1/6/2017 5:00pm	
70	Kenwick Child Care Centre	9YU741	FORD CORTINA	Brake Bias Adjustment	12/10/2017 5:00pm	
71	Riseley, Charlie	9RT874	Ford Fairlane Au 4.0l 98/00	Air Conditioning Service	12/10/2017 5:00pm	
74	Vanderwacht, Lindsey	7TT712	ALFA ROMEO 75	42 Point Safety Inspection	23/11/2017 5:00pm	
83	Turner, Robert	7OO123	HOLDEN APOLLO	62 Point Safety Inspection	13/12/2017 5:00pm	
84	Reid, Earl	GENERATOR	HYUNDAI GRANDEUR	42 Point Safety Inspection	13/12/2017 5:00pm	
82	Proctor, Diane	7KL556	ALFA ROMEO GTV6	42 Point Safety Inspection	14/12/2017 5:00pm	
85	White, Harry	7JU821	FORD FALCON	Log Book Service 110,000km	14/12/2017 5:00pm	

Search: Jobs to show: Service advisor: Local time: 14-12-2017 15:57 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 the cursor will move to an open job that has a field matching that criteria in the client field.

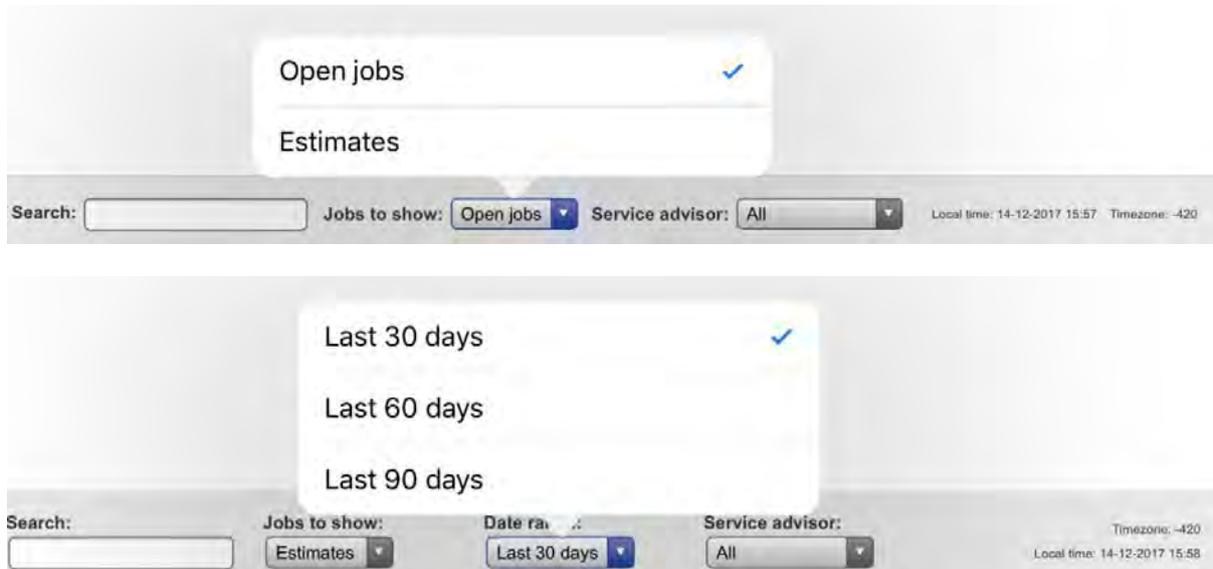
Opening A job: To open a record simply double tap on the line and the relevant job card will open.

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.

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 any 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.



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: <http://www.microbase.com.au/booking>
You will see the familiar login screen, select your site, user and password to open the form.

Automation Online Booking Form Login

Database: A1 Microbase Test Data

User: 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.

A1 Microbase Test Data - Booking

New Existing Order No.: _____

Surname/Trading name: Forster Private Business

Title: First name: Contact (business): _____

ABN (Business): _____ Phone (work): Phone (home): _____

Fax: _____ Mobile: Email:

Address:

Suburb: State: Postcode:

Vehicle details

Registration: Odometer:

Make: Model: Series: Engine:

Month: Year: Colour: Type:

Equipment: EFI Auto Aircon Pwr Ste ABS Hybrid Cylinders: _____

Vin No.: Tyre sizes: _____ Seating cap.: _____ Engine cap.: _____

Engine No.: _____ Fuel type: Ignition key: _____ Next rego due: _____

Work Required and Authorisation

Service 1: Service 2: Service 3: _____ Service 4: _____ Service 5: _____ Service 6: _____

Other work description

How did you hear of us?

Recommended Yellow pages
 Just passing Radio
 Direct mail TV
 Newspaper Internet

Note any damage to vehicle

Note any valuables in vehicle

Additional notes

Authorisation

I authorise the work described above and agree to pay for labour, spare parts and materials required for that purpose at the repairer's current rates and prices. I also understand that during repair this is a risk that data stored in but not limited to: integrated media devices, navigation systems and trip computers may be lost.

I accept that goods presented for repair may be replaced by refurbished goods of the same type rather than being repaired. Refurbished parts may be used to repair the goods.

The repairer shall not be liable for the loss of, or damage to the vehicle, its accessories or contents whilst garaged or being driven in connection with the work required unless caused by the negligence of the repairer or his/her employees.

I agree to pay the repairer reasonable storage charges if delivery of the vehicle is not taken within two days after the repairer gives notice that the repairs have been completed.

Unless drawn specifically to the attention of the repairer I certify that the vehicle (including its parts and equipment) is registered under the Motor Traffic Regulations 1935 and to the best of my knowledge is in a safe and thoroughly serviceable condition.

I give my authorisation

Payment method

Vehicle availability

Date Time

Start:

Finish:

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.

Kenswick Child Care Centre	91U741	HOLDEN COMMODORE	70	Brake Bias Adjustment	
Rosley, Charlie	96T874	Ford Fairlane Au 4.0i 98/00	71	Air Conditioning Service	
Vanderwacht, Lindsey	77T712	ALFA ROMEO 75	74	42 Point Safety Inspection	
Tong, Sydney	70X963	HONDA NSX	77	42 Point Safety Inspection	
Vincent, Peter	ABC 123	HOLDEN COMM. VS. V6 EPL 95/96	78	25 Major Service	
Forster, John	1gh456	ALFA 4.3	79	42 Point Safety Inspection	
Rosley, Charlie	96T874	Ford Fairlane Au 4.0i 98/00	80	42 Point Safety Inspection	
Rep. Links & Nibs	1Y3122	DAKOTA/BLONDAKOR SC013 Cabl. 9/200			

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.



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.

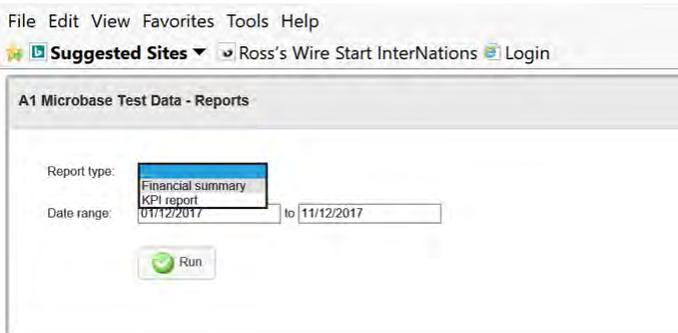
Automation Online Reports Login

Database:

User:

Password:

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.



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

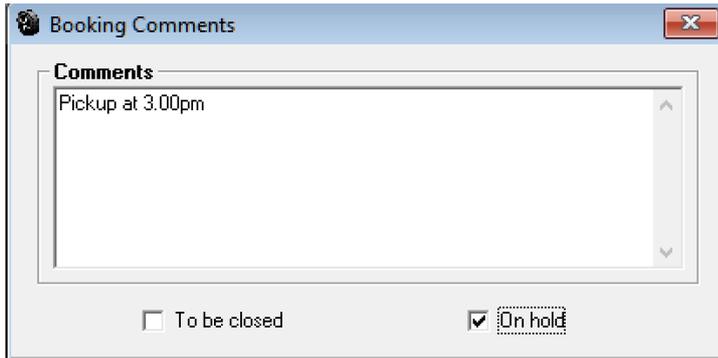


On selection there are 2 x choices create which will take you directly to the client list and view which opens the sales screen in estimate view with the months estimates displayed, to view an alternate date range select the period or date options from the top of screen.

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.



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.



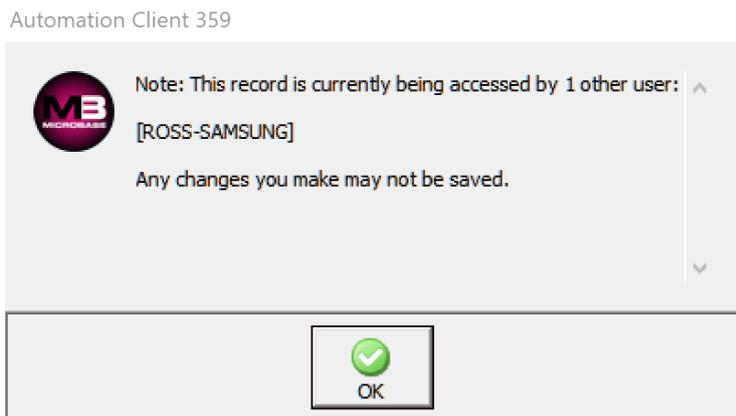
Your selections can be reversed by reopening the booking comments form and deselecting your to be closed or on hold options.

Multi Form Access Monitoring

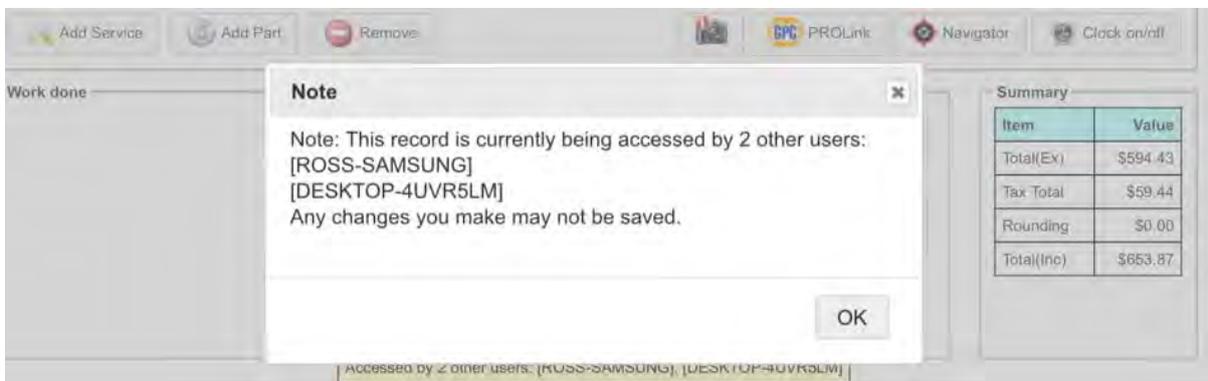
Overview: Since the release of the online job card we have had reports of users proceeding to use forms that are open multiple times, on any network system it is not possible to retain the data from all openings so if a user decides after being warned on opening the job card or other form to proceed 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

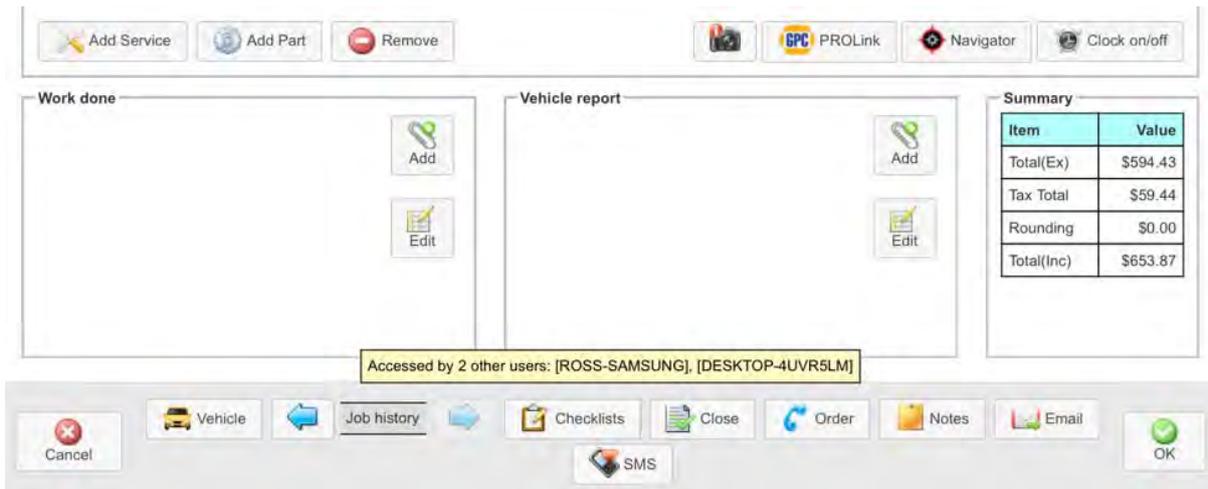
Local Client – Multi Access Warning



Online Job Card - Multi Access Warning



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