Version Release Notes

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Automation Client Version 3.7.5 (2020)

Overview: Version 3.7.5 contains many new features that are geared toward improving the daily efficiencies within your business.

As an example, we now store more information on the vehicle form, clients using Smart Inspector will see failed items and any relevant notes printed in the vehicle reports section of the invoice. We have made it easier for you to locate vehicles and jobs on the diary screen by introducing a new search option on the sales screen.

This version also allows for email and SMS communication with suppliers, changes to payroll have been introduced to allow you to pay an employee by clocked hours, there is a new search option in purchasing that allows you to easily track single or multiple payments applied to a supplier invoice.

To gain the maximum benefit from the new and improved functionality of version 3.7.5 we strongly recommend you take time to read the release notes.

Emailing Images, Recording:

When photos are sent to a client via email from the online job card, this will be recorded in the Client form -> Tasks tab. To email single or multiple images to a client go to Online job card, choose the job, click on the Files, then tick the images you want to email and click Email Client. Go OK, the email will be sent.

All a statements	car4 jpg	10.34 KB
	Email files to client	×
	Files to send: car1.jpg;car2.jpg;car3.jpg;car4.jpg;car5.jpg Message (optional):)4 KB
	This is a test email to display some images.	
+ Add files. O Start upload O Cancel upload		
	Cancel OK	

Go back into Automation Client, open the Client Form and view the Tasks tab. You will see the line item – double click to open up and see the list of images sent to the client with URLs.

Client Form					CA LIFE.	X	\$0.00 Store Form
lient Thernton	-	Private 🗆 I	Business Parent	<u> </u>]	
Contact Details Profile	Y	History	Tasks	Comments	Referrals		Files sent for Job 461
Date/Time	Туре	Done by	Item		-	-	Additional info
19/11/20 10:32am	Email		Files sent for Job	461			This is a test email to display some images.
4/5/20 3:14pm	SMS		SMS Sent				
1/5/20 3:30pm	SMS		SMS Sent				http://www.microbasecloud.com.au/jobcard/files/313/461/car1.jpg
1/5/20 3:30pm	SMS		SMS Sent				http://www.microbasecioud.com.au/jobcard/files/313/461/car3.jpg
1/5/20 3:28pm	SMS		SMS Sent				http://www.microbasecloud.com.au/jobcard/files/313/461/car4.jpg
30/4/20 3:35pm	SMS		SMS Sent - Mark	keting			http://www.microbasecloud.com.au/jobcard/files/313/461/car5.jpg
30/4/20 1:47pm	SMS		SMS Sent - Mark	keting			a particular of the second second second second second
30/4/20 1:22pm	SMS		SMS Sent - Mark	keting			IRECD'
30/4/20 1:22pm	SMS		SMS Sent - Mark	keting			Contact method
30/4/20 1:22pm	SMS		SMS Sent - Mark	keting			Check
13/11/19 6:15pm	Email		Test email				Email gt@microbase.com.au
13/11/193:51pm	Email		test				
13/11/191:11pm	Email		Invoice 135 ema	iled to client			
12/11/19 5:00pm	Email		Invoice 135 ema	iled to client			
12/11/19 3:33pm	Email		Summary 114 en	nailed to client		-	
Show email communications only							Note created on 19/11/2010:32am
							3 Luio 3 2 10 301 0
							Cancel Client OK

Note also there is a "Show email communications only" checkbox available to filter the view of Tasks to emails only.

Emailing Estimates, Summaries or Invoices, Additional Note.

When emailing estimates, summaries or invoices to clients, it is possible to have an additional text note to accompany the email. Go to the job card and click Email. You will see a text box for the additional note.

mail address		Title	То	CC	
oss@microbase.c	com.au	Email 1			
dditional note:	This note will t	be sent with the attachment		*	

Note: This option will not appear if you are using a custom email template (selected from Site Settings / Online > Custom Emails)

Booking Form

The printout of both the New Client/Booking form and the booking form will have the Series of the vehicle shown. They will also have new options: Google, Facebook, Twitter, added to the "How did you hear of us?" section.

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The booking sheet will also have "Account" payment option checked if that client has the Charge Account option ticked in their Client Form / Profile tab.

Payment meth	od (please indica	te)
Cash	EFT	Credit Card
🗌 Cheque	🔀 Account	Other
🗌 Openpay		

Vehicle Form

The Vehicle form now has CVT and DSG options available, as well as a field for state of registration.

egistration	1GFN965	Odome	eter 257496	Engine hrs	Inactive
Owner	Mr Jamie Jan	nie Potter		Reg. state WA	
Vehicle o	letails	Servicing	Comments	History	Driver
Series	BA	ries	Engine Type Month	4 L BARRA	Add
	Se	ries	Colour Silver	Type Sedan	

Vehicle List

The series has been added to the list, this can also be searched by highlighting the header of the series column and typing into the search field

S Vences												23
Rego	Make	Model	Series	Last Service Date	Next Service D	Next Service	RSA Number	RSA Expiry Date Ref	Driver	Contact	VIN	-
08MR	2008 AUDI	Q7	4LB								WAUZZZ4LX8D02425C	1
171NAT	2016 BMW	X4	F26	24/4/20	24/4/21	SERVICE					WBAXX 120 2005 3 1282	
181NAT	2006 BMW	X5	E53	22/5/20	22/5/21	SERVICE					WEAF872020LY95058	1
1AKH395	1994 BMW	M3	E36	31/10/19	31/10/20	SERVICE					WBSBF92000EA67740	1
1AMF096	1997 BMW	Z3	E36	26/6/20							WBACH72000LB04735	1
1ARS736	1994 BMW	540I	E34	29/4/20	8/4/21	SERVICE					WBAHE62070GF2138:	1
1AZ1862	2001 BMW	330CI	E46	28/2/20							WBABN52000JU73146	
1AZX534	2001 MB	E200K	210	5/2/20							WDB2100482B317525	1
1BAO 101	1998 MB	CLK320	208								WDB2083652F050104	
1B8G057	2001 AUDI	A4	8e	7/8/20							WAUZZZ8E12A11241!	1
1BBH791	2002 BMW	325CI	E46	28/2/20	3/3/21	SERVICE					WBABN32050JW3336	

Job Card

Registration due date is now displayed in the header record, also on the job card header bar we now display both the opening and booked dates.

Job #292 - Opene	d 14/5/20 - Booked 14/5/20							
Client Details Qprc Mobile: 0414371422			Vehicle Det Rego: CU000 Odo: 52738 Next service	ails CK NISSAN X-Tra Rego check: 1/1 : Log Book Service	il /21 60,000km on	14/11/20 or 62,	738	
Parts & Labour								
Item	Description	Type	Order	Quantity	Rate	Total (Ex.)	Tax Amt Tax Code	Total (Inc.) FP
050k	Log Book Service 50.000 Km	Service		2	\$131.82	\$263.64	\$26.36 GST	\$290.00

Smart Inspector

Vehicle faults documented in the inspection will be imported onto the job card when the inspection is complete. This only applies to items flagged as failed in the inspection. It will also include any additional text added via the smart inspector note icon.

Step 1: Create an inspection as normal via Automation on a job card.

Step 2: Go into Smart Inspector web interface and complete the inspection, noting any failed items with optional additional text.

Smart Inspector		CUOOCK	(- NISSAN X-TRAIL T32 2	.0L MR20DD DOHC 16v Pe	trol Direct Inj. 4qyl 106kW 6sp Man 4dr Wagon FWD [01/14 ON]			George Thornton 👤
	STEERING & SU	SPENSION	BRAKING TYRES	INSPECTION NOTES			Com	pletion (%)
doL	N/A	Inspected			Action Required		Parts	Options
Lighting		Pass Fill				L.		-
Direction Indicators/Hazards		Pass Fall	Not Working			÷.	Add	۵
Brake Lights		Pass Fall	Replace Globe(s)			- B	Add	0
Head Lights		Pass Fall	Low Beam Additional text added	via the note icon.		e la	Add	۵

Step 3: Back in Automation on the job card once more, click the Inspector button again to update the inspection details. The results will be imported:

	Inspection details	
	Name 42 Point Safety Check Notes	_
	Status Complete Report https://tinyurl.com/y4xaxaxw	
Conv Paste Files (5)	press Lube	Done

Head Lights: Low Beam, Additional text added via the note icon.

Job Card, Invoicing Zero Retail Items

Items sold for \$0.00 will now show as \$0.00 on the printed invoice:

scyl				×	Latiche starges filter. (lervele verhols for upp blades	as requires Raze vehicle. Industrial thermo- tion, exhault and bakes. Charge regress of a back differential and transmission of condition request dive shafts and plants for anvicability and refittiwich or in and refact bare? Chack ration. Clean world trees and chack serialition of ratios.	d oli and Lower Bight Volper			
Quantity	Rate \$81.52	Total (Ex.) \$100.00	Tax Ant Tax Code \$10.00 QST	Total (Inc.) FP \$110.00	Mech	anical	Services, Parts & Labour			
1	\$454.55	\$454.55	\$45.45.GST	\$500.00	Otv	Description	Unit Pric	e Total (Ex)	Tax	Total (Inc)
1	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 GST \$0.00 GST	\$0.00 F \$0.00	1	1,000km Inspection Service Relat	\$10)/ \$454	0 \$100.00	\$10.00 \$45.46	\$110.00 \$500.00
3.5	\$14.55	\$50.91	\$5.09 GST	\$96.00		Labour	30.0	0 \$0.00	\$0,00	30.00
4	\$17.50	\$17.50	\$1.75 GST	\$19.25		Ryce of filter spin on	30.0	0 \$0.00	\$0.00	\$0.00
	\$17.50	\$17.50	41.75 (651	\$19,75	3.5	10w-30 engine of	314	5 \$50.91	\$5.09	\$95.00
		a de la contra	a hour beautions		A	Sump plug was her	\$1.1	2 \$1.82	\$0.18	\$2.00
					1	Waste management fee	917.4	0 \$17.50	\$1.75	\$19.25
					+	wookshop supply	\$17.5	0 \$17.50 \$642.28	\$176 \$64.22	\$19.25 \$706.50
		- 1 -	1 . 1	1 1 - 1			Financial Commany			

Diary Search Function

Step 1: First go to the Sales screen. Enter the vehicle registration you wish to search for in the filters at the bottom.

You can choose any filters you like, including client, Job#, date range, etc. so a search is not limited to just the vehicle registration. Once you've found the job you want, highlight it and click the new Diary button at the bottom of the screen (**NOT** the diary button at the top left on the taskbar).

Sales																	
				Transac Month t	tions to s	show •	From 1/11/20	T T d	19/11/20	Currer	nt		J				
Date 6/7/20	Inv# 358	Type Invoice	Statu Open	C	Order#	Rego CH1234	Company/ Chea	Surname	-	-	First Name Cloe		Value \$232,60	Pa \$0.0	iid DO	Balance \$232.60	Print
												Total:	\$232.60	\$O.C	00	\$232.60	
Г	View by clien	t:			View Job#	*	I✓ Registration CH1234	<u>a</u>	Make/Moc Make Model	del:	-	Total: [\$232.60 k done keywo	\$0.0	00 View	\$232.60 Order#:	-

Step 2: This will now take you to the diary with the appropriate date already displayed and the job in question highlighted

Diary - 11:24am Thursday 19 November 2020				
T . 6/7/20	* * * * *	Booking Loan Car Print Note Tech Avail. 23.1	booking 🗹 Closed Open 🗸 Closed Overdue 🗸 On ha	toan/aval v Loan/aloc toan/over
Client	T Rego	Make/Model	Job#	Col. Note Serv
Beecroft, Gregory	AVD123	NISSAN NAVARA 4WD DIESEL 92/95	309	Log
Booth, Sean	8MIN666	JEEP CHEROKEE 4.L EFI 01-96/00	249	Acce
Brister, David	130765	TOYOTA MR2	247	Logi
Central West Motors	DEF556	BMW 318IS 1.9 E36 EFI 96/99	256	Logi
Chea, Cloe	CH1234	DAIHATSU CHARADE G11.CARB. 86/87	358	Air C
Collyer, Alan	1LU8CZ	HOLDEN VE COMMODORE	224	Tow

Employee Details Report

This report (Payroll reports -> Employee Details Report) has additional details as shown on the Banking and Super tab on the Employee form, such as the bank account and the super funds.



Employee Number, Sequential

Upon creating a new employee, the employee number field will be automatically filled with the highest previously recorded number + 1.

Employee Form			E
Last Name	First Name	Middle Initial	
Details	Payroll	Banking & Super	Comments
Emp. No. 13	TEN	Address	
Joined	Left		

Diary Tech Time Filters

The diary filters for job types are now included on the tech time view.

🚳 Diary - 11:33am Thursday 19 November 2020		_
7	Booking Loan Car Print Note Tech Avail. 23.1 I Ecoloring Closed Booking Loan Car Print Note Rem. 20.6 V Open V Closed	
Client	\Rego Make/Model	
Beecroft, Gregory	AVD123 NISSAN NAVARA	4WD DIE
Booth, Sean	8MN666 JEEP CHEROKEE	4.L EFI 0
Brister, David	1JD765 TOYOTA MR2	
Central West Motors	DEF556 BMW 318IS 1.9 E	36 EFI 9

Diary, Moving Bookings & Time Allocations

When moving a booking that has tech time allocated via the tech time view, the allocations will be automatically deleted if those allocations no longer fit into the new booking time frame.

Step 1: Go to tech time view on the diary and select a technician. Click and drag along a line to allocate that tech to a particular job.

Step 2: Double click on the allocated time area for that job – this will bring up the booking form. Change the dates.

Step 3: The previously allocated tech time will be automatically deleted if the new booking time frame does not include the previous date where the time was allocated.

Supplier, SMS & Emailing

It is now possible to make Notes that send either SMS or emails to suppliers. A record will be kept of these communications. Essentially this functionality mimics what is available to clients.

Step 1: Go to the supplier form for a particular supplier. Ensure they have a valid email address and mobile number (mobiles can be entered in Phone and/or Phone2 fields).

Step 2: Go to the Tasks tab, and click the new Note button. You can select any contact method including SMS or Email. Clicking OK will send the communications and save the record.

Supplier Form		Note Form
Supplier Alfagomma Parent (None)	Code Alfa Category Supplier	Another Sms
Details	Bank Details & Comments	Tasks Additional info
Date/Time Typ 19/11/20 11:42xm Note 19/11/20 11:38am Note	e Done by Item Another Sms Dust A Simple Sn	s s Contact method Contact Contact method Contact Contact

Purchasing

When adding or editing Bills, Credits and Purchase Orders, clicking the red cross button at the top right to close to window (or clicking the Cancel button in the bottom left) with unsaved changes will result in a warning to the user, requiring them to confirm if they want to cancel.

• Bill	C Credit	C Purchase Order	Date	19/11/20 Invoice/Ref# 433454	
Supplier B	Bursons		Comments		2
Terms 3	0 days EOM	Bill Due 31/12/20	Cancel new	Bill?	
Recurrin	ng	- Next	- 0	This is a new Bill. If you cancel, it will not be	-
ems				saved.	
tem	Description	Туре	Job	Are you sure you want to cancel this Bill?	Tax Amt Tax Code Total (Inc
			0	Lube Moress Lube	f

Payroll Transaction Form

In addition to being able to insert employee hours onto a payroll transaction by actual hours or charged hours in the period, there is a new option to use clocked or by time on hours for the period.

Details				Paym	ent Details			
Employee	Blackie, Scott	Date	25/11/20	Media	Online	•		
Comments			2	Accou	nt AA Automo	tives Trad	ing Accour	nt
	1		-	Record	а [_
Period					Hours accrued			
Frequency	Weakly - From	22/11/20	To 28/11/2	0 1		per	current	this pay
requercy	- Incerty - I trem I		I to leotrate		Sick pay	0	0.000	0.000
					Contraction of the second s			
	Insert payment for this per	riod: by tim	e on	-	Holiday pay	20	41.920	0.384
	Insert payment for this per	hind: by tim	tual hours	-	Holiday pay RDO	20	41.920	0.384
	Insert payment for this per	hind: by tim by act by chi by chi by chi	tual hours arged hours cked hours	•	Holiday pay RDO LSL T Exdu	20 0 0 de accruak	41.920 0.000 0.000 s for this p	0.384 0.000 0.000 Nay
humante	Insert payment for this per	by tim by act by chi by chi by tim	tual hours arged hours cked hours cked hours	-	Holiday pay RDO LSL T Exdu	20 0 de accrual	41.920 0.000 0.000 s for this p	0.384 0.000 0.000 Nay
Payments	Insert payment for this per	by tim by act by chi by do by tim	tual hours arged hours cked hours cked hours	Pate	Holiday pay RDO LSL Total	20 0 de accrual	41.920 0.000 0.000 s for this p	0.384 0.000 0.000 Nay
Payments Type Hourly	Insert payment for this per Tax	by tim by act by chi by do by tim Super	te on tual hours arged hours dxed hours dxed hours e on Quantity 2.02	Rate	Holiday pay RDO LSL Total \$0.00	20 0 de accruair Gro	41.920 0.000 0.000 s for this p tals	0.384 0.000 0.000 Nay \$0.00
Payments Type Hourly	Insert payment for this per Tax	Super	te on tual hours arged hours cked hours cked hours con Quantity 2.02	Rate \$0.00	Holiday pay RDO LSL I Exclu Total \$0.00	20 0 de accruais Gro Tao	41.920 0.000 0.000 s for this p tals	0.384 0.000 0.000 way \$0.00 \$0.00
Payments Type Hourly	Insert payment for this per Tax	Super	e on bual hours arged hours cked hours cked hours con Quantity 2.02	Rate \$0.00	Holiday pay RDO LSL Total \$0.00	20 0 0 de accruale Tot Gro Tao Oth	41.920 0.000 0.000 s for this p tals wss wss wer	0.384 0.000 0.000 way \$0.00 \$0.00
Payments Type Hourly	Tax	Super	e on tual hours arged hours cked	Rate \$0.00	Holday pay RDO LSL Total \$0.00	20 0 0 de accrual Gro Tao Oth Net	41.920 0.000 0.000 s for this p tals wss k	0.384 0.000 0.000 say \$0.00 \$0.00 \$0.00
Payments Type Hourly	Tax	Super	e on bual hours arged hours cked hours ie on Quantity 2.02	Rate \$0.00	Holday pay RDO LSL T Exclu Total \$0.00	20 0 de accruair Gro Tao Oth Net Sup	41.920 0.000 0.000 s for this p tals was her t ber (\$ 9	0.384 0.000 0.000 say \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00

Note – this feature requires that there be clocked or time on hours for the employee in the specified payment period. The user will be informed if there is no record of hours for the date range.

This will add into the payments area a type of "Hourly" and the total hours based on the option selection with the totals automatically inserted in the payments area of the form.

The Time On option has also been enabled for non-technicians.

Online Job Card, Record Sort

It is possible to change the ordering of the open jobs displayed, either by Start date/time or Finish date/time, by selecting the desired option

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Search:	Jobs to show: Open jobs 🛩	Sort by: F	inish date/time ⊻	Service advisor:	All	×
		G	inish date/lime			
		\$	start date/time			

Loan Cars, Additional

Additional loan cars beyond the first can now be allocated to the same client.

Deposits, Memo Field

It is now possible to alter the memo fields of deposits, even if that deposit has been reconciled, as long as none of the values are changed.

Bill Payment Form

Bills displayed on bill payments are ordered first by date, then by invoice number

All		From	Due date				
tills to pay				_	_		_
Inv Date	Inv/Ref#	Supplier	Due Date	Value	Paid	Balance	Payment
17/8/20	109810	Audi Centre Perth	30/9/20	\$110,10	\$0.00	\$110.10	
14/8/20	109820	Audi Centre Perth	30/9/20	\$10.29	\$0.00	\$10.29	
12/8/20	109717	Audi Centre Perth	30/9/20	\$33.18	\$0.00	\$33.18	
11/8/20	109556	Audi Centre Perth	30/9/20	\$4,204.87	\$0.00	\$4,204.87	
3/8/20	109385	Audi Centre Perth	30/9/20	\$1,060.06	\$0.00	\$1,060.06	
31/7/20	109346	Audi Centre Perth	31/8/20	\$164.00	\$0.00	\$164.00	
30/7/20	109362	Audi Centre Perth	31/8/20	\$84.79	\$0.00	\$84.79	
21/7/20	109120	Audi Centre Perth	31/8/20	\$264.00	\$0.00	\$264.00	
20/7/20	108988	Audi Centre Perth	31/8/20	\$158.91	\$0.00	\$158.91	
17/7/20	CM108809	Audi Centre Perth	31/8/20	-\$402.10	\$0.00	-\$402.10	
17/7/20	109022	Audi Centre Perth	31/8/20	\$185.72	\$0.00	\$185.72	
17/7/20	109013	Audi Centre Perth	31/8/20	\$130.32	\$0.00	\$130.32	
16/7/20	108989	Audi Centre Perth	31/8/20	\$1,051.61	\$0.00	\$1,051.61	
16/7/20	108973	Audi Centre Perth	31/8/20	\$29.35	\$0.00	\$29.35	
14/7/20	108754	Audi Centre Perth	31/8/20	\$1,328.42	\$0.00	\$1,328,42	
14/7/20	108740	Audi Centre Perth	31/8/20	\$227 94	\$0.00	\$227.94	
Allocat	ed \$0.	00 Remainder \$0.00	Find reference	e:	>>	Select All	Clear

Remote Bookings, Log Access

It is now possible to view any outstanding remote bookings made either via a website booking form, or by enhanced emails.

Step 1: Go to the Online menu and select the new option "Outstanding Remote Bookings".

File Activities Admin Lists Reports	Online Help Microbase website Microbase support Release notes
Bill Payments	Contact us Suggestion Box
Bill Payments	Online Job Card Online Booking Form Online Reports
Date Amount Allocated S	Outstanding Remote Bookings

Step 2: Review any outstanding bookings:

Date/Time	Туре	Client	First Name	Registration	Service
3/04/2020 5:47:00 AM	Estimate	Solution	Redback	12345678	Barrent .
21/04/2020 6:49:00 AM	Booking	test	test	123	Labour
22/06/2020 11:15:00 PM	Booking	Gray	Chris	AHS462	Labour
26/06/2020 2:41:00 PM	Booking	Shultz	Jacob	CI76HA	Labour
26/06/2020 3:09:00 PM	Booking	Shultz	Jacob	CI76HA	Labour
5/10/2020 5:24:00 AM	Booking	mosparron	ben	abc123	Labour
5/10/2020 5:26:00 AM	Booking	mesparron	ben	abc123	Labour
5/10/2020 5:32:00 AM	Booking	mesparron	ben	abc123	Labour
1/10/2020 2:51:00 AM	Booking	sdf	sdfsdf	wwer	Labour
1/11/20	EE Booking	Customer	Hello	9RT874	
1/11/20	EE Booking	Goh	Ken	900564	
1/11/20	EE Booking	Chea	Cloe	CH1234	

It is possible to highlight an entry and click either the Client or Vehicle buttons to go to the corresponding Client or Vehicle record that matches the item.

Note – In order to process these online bookings, ensure that you have a machine on your network with the appropriate options checked in online settings:

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Inventory Reporting Locations

All inventory reports that offer category filters now include the location of the parts (next to the category) on the report. This affects the following reports:

- Inventory Valuation
- Inventory Stock Status
- Reorder Report
- Item Detail
- Stock Movement
- Stock Movement by Source
- Inventory Over Stock

Inventory Valuation

19/11/2020

Category	Item	Description	On Hand	A
	52960 BL	Fuse-maxi Blade 60amp	1.00	
			6.00	
AUTOMOTIVE	ELECTRIAL - GLOBES & P	USES [BAR ROTA 0213]		
	53430BL	Fusible Link-mini Female 30amp	2.00	
			2.00	
AUTOMOTIVE	ELECTRIAL - GLOBES & F	USES [BAR ROTA 0214]		
	53640 BL	Fusible Link-female Mini 40amp	1.00	
			1.00	
AUTOMOTIVE	ELECTRIAL - GLOBES & F	USES [BAR ROTA 0217]		
	54405BL	Holder-fuse inline ¹ W/proof Bpk	1.00	
			1.00	
AUTOMOTIVE	ELECTRIAL - GLOBES & P	USES [BAR ROTA 0222]		
	53080 BL	Fusible Link-female 80amp	1.00	
			1.00	

Bill Payments, Remittance Advice

Remittance advice includes mention of parent account, if any:

Supplier De Supplier	stails Repco		Bill Paymen	\$0.00	Date [20/10/16	1	u 12456	domores contag	Remittance A	dvice
8	 Include subaccor Payment Terms Current Balance Unallocated 	unt: 14 days \$197,268.40 \$0.00	Media U Account Record	napplied credits	•		1	Capric	Supplier orn - Repco		Date:
									N- 1411 5150		
Month to da		From 1/11/20 To 15/1	11/20 🗌 🖓 Due de	te				Frema	100 YVA 6160		Media: Record:
Month to da Bills to pay Inv Date	inv/Beta	From 1/11/20 18/1	11/20 _ I⊽ Due da	te Value	Paid	Balance	Pauroent	Frema Tel: 95	62 3366 Fax: 9569 9998		Media: Record:
Hills to sho Month to da Hills to pay Inv Date 25/3/10	ke 💽 I Inv/Bet# AStockaus, 2	From 1/11/20 To 19/1 Suppler	11/20 _ IP Due de Due Date 125/2/10	Value 44.867.50)	Paid 34,867.50	Balance \$11.00	Payment \$4.0027-50	Tel: 95 Date	02 3366 Fax: 9569 9990	Value	Media: Record: Prv. Paid
Manih to sho Manih to da Bills to pay Inv Date 25/8/10 25/8/10	Inv/Ref#	From [1/11/20] To [15/1 Suppler Reco Repco	17/20 _ ₽ Due da Due Date E5/6/10 25/8/10	Vakae 44.857.50 -44.957.50 -44.957.50 -44.957.50	Paid 34.857.50 94.957.50 64.957.50	Balance \$11.00 \$0.00 \$0.00	Payment \$4,557.50 07 \$4,857.50 07 \$4,857.50 07	Tel: 95	62 3366 Fax: 9569 9998 Reference	Vakie -34 867 50	Media: Record: Prv. Paid

Journals

Journal entries now utilise the default tax code specified in Settings / Accounts tab. This will automatically place the tax code onto any new line items added onto a journal, with the tax amount auto-calculating once a debit/credit value is entered.

🕲 Journal Entry					
Date 19/11/20 Ref. (new)	Memo				
Account	Name	Debit	Credit	Tax Code	Tax Amt
Insurance - Equipment		 \$55.00		GST	\$5.50

Client List, Mobile #2

The Client List now has the Mobile 2 (if any) shown

Clients									
Client/Company	First Name	Account No	Home Phone	Work Phone	Mobile	Mobile 2	Addr		
Beecroft [@]	Dave	C7	(0427) 994559		0422269726	3214324234	The fir		
Belmont salvage yard		19		(08) 94594448	0555555555	0222222222	32 aus		
Belmont salvage yard - Booth	Sean	12	(08) 94514034				9 Fern		

Reporting, Employee Time On/Off

A new report is available. Go to Reports menu -> Payroll reports -> Employee Time On/Off. Choose all or selective employees and the date range, the report will detail all of the time on/off for the period.

AA Automotives Employee Time On/Off

24/11/2020

For the period 01/11/20 to 24/11/20.

Employee	Time On	Time Off	Hours
Blackie, Scott	24/11/20 9:34am	24/11/20 11:35am	2.02
		Total Hours	2.02
Johnson, Jayne	9/11/20 10:37am	9/11/20 1:01pm	2.40
	24/11/20 8:00am	24/11/20 11:30am	3.50
		Total Hours	5.90
Kev, W	24/11/20 8:49am	24/11/20 11:49am	3.00
		Total Hours	3.00

Bill Payments – locating and printing

In purchasing it is possible to locate all bill payments made for a particular bill and print out a list of those payments.

Step 1: Go to Purchasing, then highlight the bill you want to locate payments for and click the Locate button.

Purchasi	ng								2
			Transac	tions to show					
				Bills Credi	its Bills & C	Iredits	Orders	Uutstanding	
			All		From	1 10	-1	T Due date	
Bills									
Date	Inv/Ref#	Supplier		Due Date	Total (Inc.)	Paid	Balance	Comments	*
4/1/16	2480605296	Capricorn - Repco		4/1/16	\$66.39	\$0.00	\$66.39		-
4/1/16	3480774920	Capricorn - Repco		4/1/16	\$45.87	\$0.00	\$45.87	PO#: 2253	
30/12/15	3480774404	Capricorn - Repco		30/12/15	\$42.74	\$0.00	\$42.74	PO#: DARRYL JOB 2242	
30/12/15	3480774389	Capricorn - Repco		30/12/15	\$24.81	\$0.00	\$24.81	PO#: DARRYL 2235	
23/12/15	3980242637	Capricorn - Repco		23/12/15	\$40.15	\$40.15	\$0.00		
23/12/15	3980242619	Capricorn - Repco		23/12/15	\$25.30	\$25.30	\$0.00		
19/11/15	3480768450	Capricorn - Repco		19/11/15	\$167.20	\$0.00	\$167.20	PO#: 2075.	
13/11/15	3480767632	Capricorn - Repco		13/11/15	\$44.72	\$0.00	\$44.72	PO#: STOCK	4
10/11/15	3480767152	Capricorn - Repco		10/11/15	\$58.30	\$0.00	\$58.30	PO#: DARRYL 2000	_
3/11/15	3480766313	Capricorn - Repco		3/11/15	\$20,35	\$0.00	\$20.35	PO#: 1985	•
				Total	\$228,814.68	\$10,235.00	\$218,579.68		
			F	View by supplier:	☐ Include sub	-accounts	☐ View In	voice Number:	
J ^{aness}	Luhe	Edit	Delete	Payment	Locate	LU L Sto	interse ock	Remains Lubio Apress Lubio	ube priess O Done

Step 2: This will take you to the Bill Payments form. All necessary filters will automatically be filled in for you, including the new "Allocated to Inv#" filter. This will therefore now be displaying all bill payments made for the selected bill:

Bill Payments Date Amount Allocated Supplier Media Record Account Exported Emiliary 20/10/16 \$500.00 Image: Total: \$500.00 Image: Total: \$500.00				Transactions to	how From	m To		types	Unallocated	(All) 💌			
Date Amount Allocated Supplier Media Record Account Exported Emiliary 20/10/16 \$500.00 Image: State in the state in	ill Payments												
Total: \$500.00 If View by single supplier: If Allocated to Inv# Capricon - Repco	Date 20/10/16	Amount \$500.00	Allocated Suppl	er		Media	Record		Account Cash On Hand		E>	kported	Emailed
Total: \$500.00 View by single supplier: Capricorn - Repco [3980242637]													
\$500.00 View by single suppler. Capricorn - Repco \$3980242637													
Total: \$500.00 View by single supplier: Image: Capricorn - Repco Capricorn - Repco Image: Capricorn - Repco													
View by single supplier. If Allocated to Inv# Capricorn - Repco						_				_			
Capricom - Repco [3980242637	Total:	\$500.00	-							_			
	Total:	\$500.00	-	_		View by single	supplier:	Allocated to In	v#	-			
	Total:	\$500.00				View by single	supplier:	Allocated to In 3980242637	~#			_	
	Total:	\$500.00	vess Lübe			View by single Capricom - Report	supplier:	Allocated to In 3980242637	e Xaross	Lubo Xpre	nss Laibe 🌋	fpress Li	ubi

You can choose to print the list of displayed bill payments at any time and a printout matching the display will be provided.

ABC Test Data

Bill Payment List

19/11/2020

No date restriction. Supplier: Capricorn - Repco, Allocated to Inv: 3980242637.

Date	Amount	Alloc.	Supplier	Media	Record	Account	
20/10/16	\$500.00	1	Repco	Cash		Cash On Hand	
Total	\$500.00						