

Release Notes Version 3.8.0

Table of Contents

Overview	2
Job Card	2
Loan Cars	3
Estimates	4
Employees \ Payroll	5
Parts	6
Purchasing	8
Bill Payments	8
Suppliers	10
Time On \ Time Off	11
Diary	11
Equipment Maintenance Register	11
New Item	11
Checklists	12
Tasks	14
Incidents Register	15
New Record	15
Notes	16
Tasks	17
STP Phase 2	18

Overview

Version 3.8.0 introduces some exciting new features that include changes to the hard copy job card, drivers' information on the loan car contract, ability to search for non-converted estimates in marketing, Automation V3.8.0 also prompts you to paste previous vehicle faults to an estimate which flow through to the job card when converted. You can now record a preferred supplier on the part form and place a specific order, we have increased the pay option in payroll and added to the employee form the ability to store multiple alternate contact details.

To assist you in winning more work from estimates we have expanded the search option available from the sales screen, bill payment reconciliations can now be placed "on hold" much the same as bank reconciliations. There are changes to payment receipting and purchasing that are geared toward improving management processes. Supplier's records now have the ability to store multiple phone numbers and email addresses.

Finally, for those users that have been unable to access the equipment and incident registers the functions are now available for all users. Please read these release notes so you can take full advantage of the enhancements included in version 3.8.0.

Job Card

MyAutoConnect: To avoid confusion if a client is not a registered MyAc client the option to communicate via the app is now greyed out and unusable.



Job Card Printed Version: Two additional fields have been added, current Odo (for completion by the technician) and in the last service section you will see an odometer reading which represents the reading the last time the vehicle was serviced \ repaired.

Job Card		Job No. 137	Printed 16/11/2021
Client		Contact Details	Availability
Robert Turner 52 Lunar Way Beckenham WA 6107		Ph. Home: (0417) 266774 Email: someone@somewhere.com.au	Start: 19/11/21 8:00am Finish: 19/11/21 5:00pm
Vehicle Details			
Registration: 700123	Month: March	Year: 1991	VIN No.: _____
Current Odo: _____	Colour: Gold	Type: Sedan	Engine No.: _____
Make: Holden	EFI: Yes	Auto: Yes	Front tyres: _____
Model: Apollo Jk.Carb. 89/91	Air Con: Yes	Pwr Str: Yes	Rear tyres: _____
Series: _____	ABS: No		Engine cap.: _____
Engine type: _____			Seat cap.: _____
Ref: _____			Fuel type: _____
Last Service		Next Service	
Last Service: Cat 3306 Pump Date: 15/11/21 Odometer: 84512			
Work to be Done			
Cat 3306 Pump.			
Reported Last Time			
Deposit Taken 5/11/21 100.00			

Emailing: When emailing from the job card you now have the spell check option available

Please confirm the email addresses you wish to receive this Summary:

Client: Robert Turner

Email address	Title	To	CC
someone@somewhere.com.au	Email 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Additional note:

Check

Cancel OK

Loan Cars

The loan car contract now includes the drivers name and driver's license expiry date. We have added the ability to store other driver's license details on the client form via a new **Drivers Tab**, record includes State of issue, license # and expiry date.

Client: Proctor Private Business Parent: ...

Contact Details Profile History Tasks Comments Referrals **Drivers**

Name	License#	State	Expiry
Fred	123762	WA	25/11/21
Joe	3287946	VIC	11/12/21

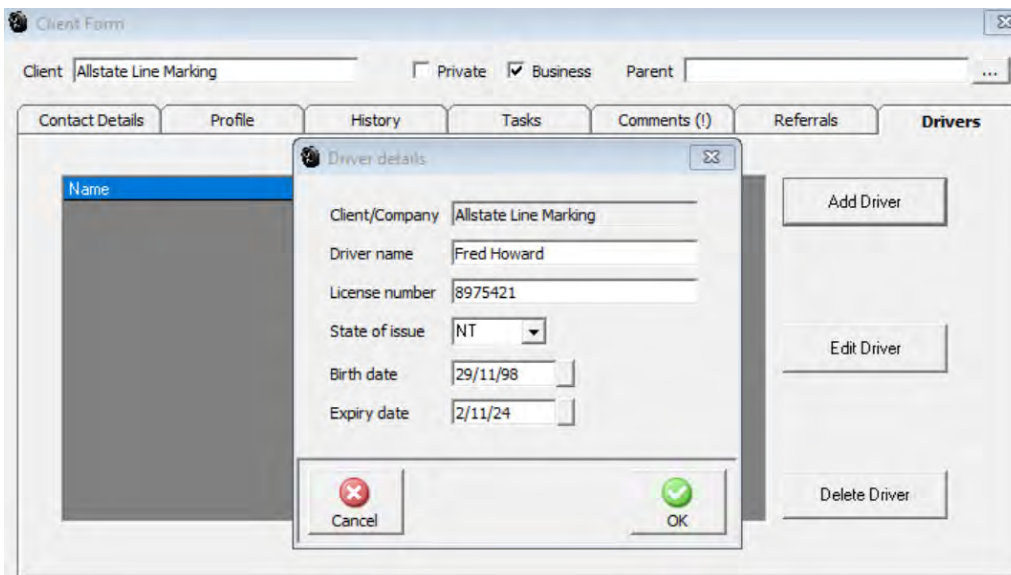
Add Driver

Edit Driver

Delete Driver

Cancel Vehicles Estimate OK

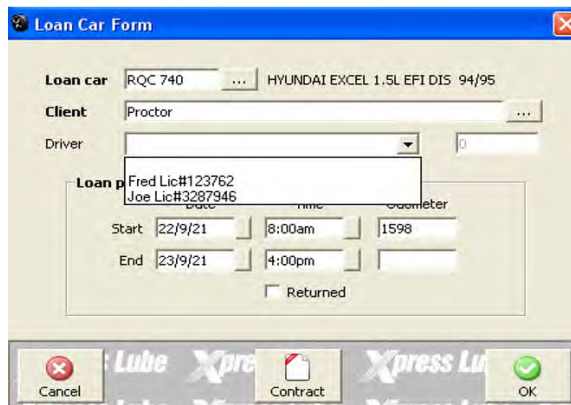
Adding A Driver: To Add a driver click on the Add Driver option and complete the displayed form, save the details with OK (F12).



Editing A Driver: Select the Edit Driver option, execute your changes and save the new details with OK (F12)

Deleting A Driver: Highlight the record you wish to delete and select the Delete Driver option.

Creating A Booking \ Contract: The loan car form includes a new field titled Driver, all drivers registered to the owner are available by selecting the arrow to the right of the field. Complete the rest of the information and select contract, the contract will display including the drivers' details entered on the client form.

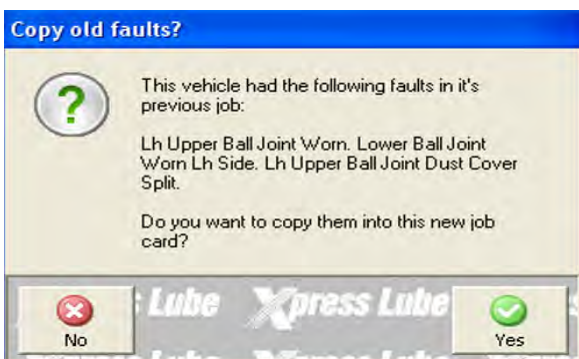


The under mentioned Noel Burke Motor Repairs (the company) Courtesy Vehicle is made available to the Customer (whose name appears below) as a bailee will be subject to the following conditions and any other Statutory or Motor Vehicle Regulations in force at the time of accepting the conditions as stated in this form.

VEHICLE	FORD ESCAPE	REGISTRATION	8MJK987
CUSTOMER	Allstate Line Marking	DRIVER	Fred Howard
ADDRESS		LICENSE NO	8975421
		DOB	29/11/98
		EXPIRY DATE	2/11/24
		STATE	NT
TIME OUT	29/11/21 8:00am	DUE BACK	29/11/21 5:00pm

Estimates

Vehicle Faults: When creating an estimate version 3.8.0 will prompt you to insert the vehicle faults reported on the last service \ repair, the faults will then flow through to the job card when an estimate is converted. To accept inserting the faults simply select the OK (F12) option from the prompt.



Estimate Filters, Sales Screen: The new version incorporates additional estimate search criteria from the sales screen Estimates All, Estimates Converted, Estimates Not Converted.

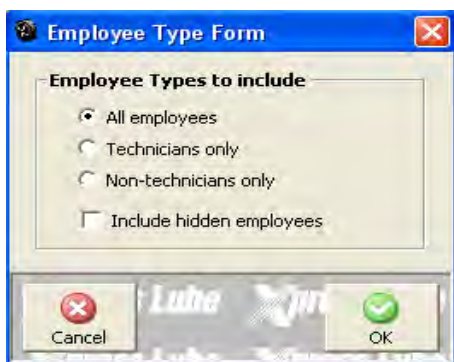


Estimates, Marketing Filters: A new search is available from marketing, it is possible to search for all estimates within a date range or just non-converted, simply enter the date range into the fields provided using the drop-down calendar and activate the search via OK (F12).



Employees \ Payroll

Employee Barcodes: Automation has expanded the employee selection type when printing barcodes from the **Reports \ Other Reports \ Employee Barcodes** option, you can now select from all, technicians only or non-technicians plus include \ exclude inactive employees.



Employee Form, Alternate Contacts: Version 3.8.0 introduces the ability to add multiple alternate contacts to the employee form, details include Name, relationship and contact phone #.

Alternate Contacts, Adding: Open the employee form, the right of alternate contacts field select the button, a list of contacts is displayed, to enter a new contact complete the fields provided, the record flagged as default will display in the alternate contact field.

The screenshot shows the 'Employee Form' window with the following data:

- Last Name: Fred, First Name: Johnson, Middle Initial: [empty]
- Details: Emp. No. 3, TFN 258 357 159, Type Full-time, Class Technician, D.O.B. [empty], Gender Male, Daily hours 7.6, Inactive [unchecked], Phone [empty], Mobile [empty], Email [empty], Drivers License [empty], Expiry [empty], Alternate contacts 0102 223 232
- Address: 16 Ferry Road, Suburb Spearwood, State/City WA, PostCode/Province 6163
- Contacts sub-window:

Contact number	Name/relationship	Default
0102 223 232	Emergency	<input checked="" type="checkbox"/>
1230 222 382	Albert/father	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Payroll, Additional Payment Types: There are 4 x new payment types available from the payroll transaction form Hourly Type 2, Type 3, Overtime Sunday and overtime Saturday, when inserted these pay types are printed on the payslip.

The screenshot shows the 'Payments' window with the following data:

- Payments table:

Type	Tax	Super	Quantity	Rate	Total
(None)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
- Totals summary:

Gross	\$0.00
Tax	\$0.00
Other	\$0.00
Net	\$0.00
Super @	0 %
Super	\$0.00
- STP Status: Outstanding
- Buttons: Send, Finalise, Check

Parts

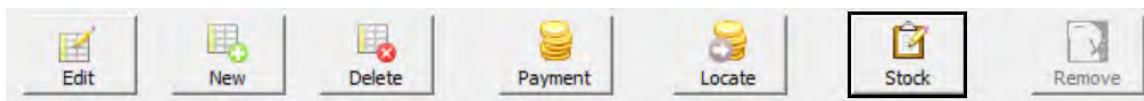
Preferred Supplier Option: This version allows for the recording of a preferred supplier on the part form, it is then possible to search for items with a preferred supplier recorded from purchasing by selecting the stock option from purchasing.

Preferred Supplier, Selecting: Open the part form, point and double click on the button to the right of the preferred supplier option, your supplier listing will display, highlight the supplier and save with OK (F12) the name of the supplier will populate the preferred supplier field.

The screenshot shows the 'Part Form' window for 'Oxygen Sensors' (Part No. 0 258 986 614). The 'Details' tab is active. The 'Preferred supplier' field at the bottom is highlighted with a red box and contains the text 'Budget Auto Parts'. Other fields include 'Type' (Inventory), 'Category', 'Income Account' (Parts), 'COGS Account' (Cost Of Goods Sold), 'SKU', 'Location', 'Bar Code', 'Units' (Each), 'Stock' (On Hand: 0, Total Value: \$0.00, Avg Value: \$0.00), 'Price (Inc. Tax)' (Standard: \$107.25, Wholesale: \$0.00, Trade: \$0.00), and 'Tax' (GST). Buttons for 'Cancel', 'Item Sales', and 'OK' are visible at the bottom.

The screenshot shows the 'Reorder Report' dialog box. Under the 'Criteria' section, there are buttons for 'Selective Categories', 'Selective Suppliers', 'Selective Locations', and 'All'. A checkbox labeled 'Use preferred supplier' is checked and highlighted with a red box. There is also an unchecked checkbox for 'Consignment stock only'.

Reorder Report, Selecting Preferred Supplier: Go to purchasing, from the bottom of the display select the stock option, from the choices displayed select preferred supplier, a report is displayed on your screen that can be converted to a purchase order. **Note:** You must have your minimum and maximum stock values entered on the part form for this function to work



Stock Location: It is now possible to make stock locations inactive, open the locations list from the part form, point and double click on the record you wish to make inactive and select the inactive option. If you wish to view inactive locations you can flag the inactive option at the bottom of the list. To make an inactive item active simply deselect the inactive option on the location details form.

The screenshot shows the 'Location Details' dialog box for 'Shelf 1'. The 'Inactive' checkbox is checked and highlighted with a black box. Buttons for 'Cancel' and 'OK' are visible at the bottom.

Purchasing

Order Quantities: When using the stock option from purchasing your suggested quantity now takes into account the number of items already allocated to jobs. **Note:** You must have your minimum and maximum stock values entered on the part form for this function to work

Supplier	Category	Item	Description	On Hand	Min. Stock	Max. Stock	Allocated	On Order	Suggested
None	Hose	1231035	Radiator Hose 1.34 Id (per Meter)	0.0	0	0	0	0	0.0
Oil & Energy Pty Ltd	Oil	1074583	Triton Synthetic Fe 75w90	6.4	10	30	1.5	0	25.1
Oil & Energy Pty Ltd	Oil	1076587	5w/30 G11 - Full Synthetic	3.3	50	208	4.3	0	209
None	Filter - Oil Filter	1205001	Oil Filter	0	1	1	0	0	1
Club Assist	Battery - RAC	2382	Battery	0	1	1	0	0	1
Autopro Northam	(Unspecified)	483268L	H7 12v 55w Globe	0	3	3	0	0	3
Club Assist	Battery - RAC	5375	Battery	0	1	1	0	0	1
Goodchild Enterprises	Battery - BOSCH	55D22L	Bosch Battery	2	2	2	1	0	1
Goodchild Enterprises	Battery - BOSCH	56318	Battery	0	1	1	0	0	1
Goodchild Enterprises	Battery - BOSCH	58014	Battery	0	2	2	0	0	2
Goodchild Enterprises	Battery - BOSCH	95D31L	Battery	5	4	4	0	0	1
Lynford Welshtool	(Unspecified)	AB39A26412.CB	Rear Door Latch - Rh - Ab39-a26412.cb	-2	0	0	0	0	2
Lynford Welshtool	(Unspecified)	AB39A26413.CB	Rear Door Latch - Lh - Ab39-a26413.cb	-2	0	0	0	0	2
Lynford Welshtool	Filter - Fuel Filter	AB399176AC	Fuel Filter	-1	0	0	0	0	1
Goodchild Enterprises	Battery - BOSCH	AU22R550	Battery	1	2	2	0	0	1
Autopro Northam	(Unspecified)	CB16110	Radiator Cap	0	1	1	0	0	1
Autopro Northam	(Unspecified)	ECR2450	Battery 2450	0	1	2	0	0	2
Napa Parts	(Unspecified)	HH160L30	Heater Hose 16mm	-0.3	0	0	0	0	0.3
None	(Unspecified)	HH58/2	Heater Hose 16mm 5/8"	-0.6	0	0	0	0	0.6
Goodchild Enterprises	Battery - BOSCH	LNA	Battery - Stop Start	0	1	1	0	0	1

Bill Form \ Purchase Units: A new column displaying the purchase units value recorded on the part form is now included on the bill form.

Item	Description	Type	Job	Service	Purchase Units	Quantity	Rate	Total (Ex.)
000700015	Ate Plastilube	Inventory			50	1	\$7.88	\$7.88
003-20-03356	Cabin Filter (mini)	Inventory			75	1	\$21.50	\$21.50
00571075	Screw, Hexagon Head M10x7	Inventory			100	1	\$1.18	\$1.18

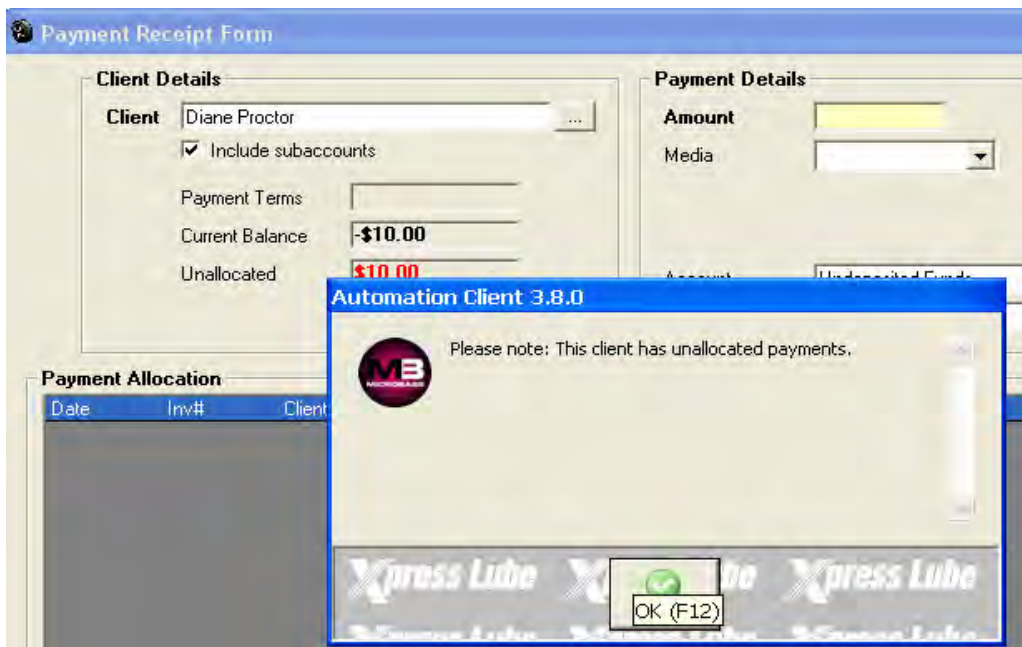
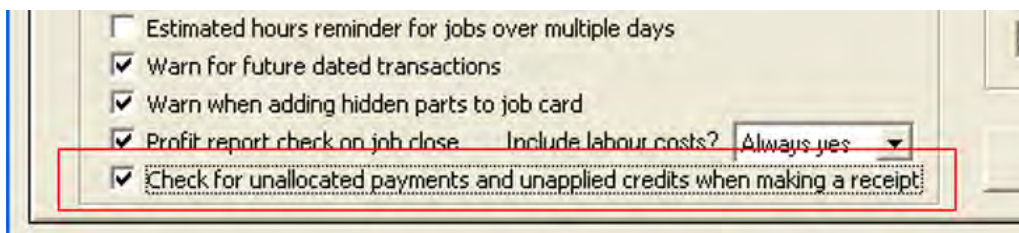
Bill Payments

Bill Payments, On Hold Function: It is now possible to place a bill payment reconciliation on hold, much the same as you can bank reconciliations. There is an on-hold option in the header of the bill payment form, if you wish to place a reconciliation on hold simply flag the tick box, select OK (F12) and you will be able to return to your payment screen to finalise the reconciliation. **Note:** If you wish to place the bill payment on hold multiple times you will need to de-select the option on opening, flag bills for payment then re-select the on-hold option.

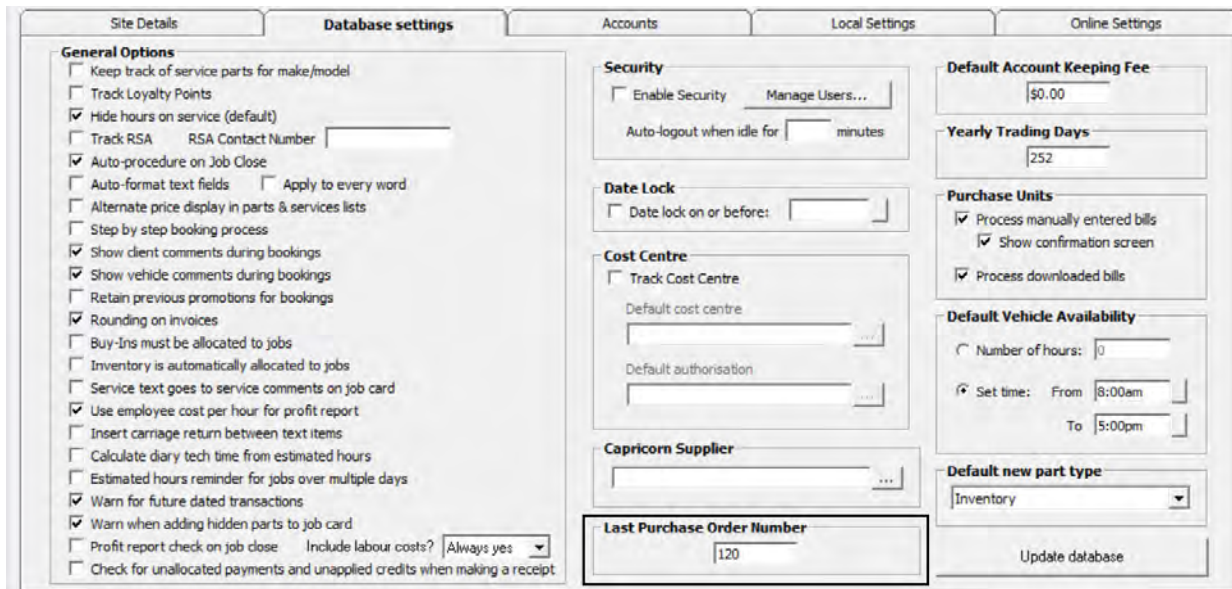
On hold bill payments can be accessed from Accounts \ Bill Payments, you will see the On-Hold notation recorded in the supplier's name column, to access, highlight, point and double mouse click. Remember to deselect the option once you have completed your reconciliation and want to process the final payment.



Payment Receiving: Version 3.8.0 when processing payment receipts if there are unallocated values or unapplied credits Automation displays a message informing the user. This function is optional and can be activated \ deactivated from site settings \ Database Settings.



Purchase Order Reference Reset: It is now possible to reset the purchase order # from **File / Database Settings > Last Purchase Order Number**. Simply enter the number you wish the sequence to start from, the next PO will display that value which will increase sequentially until reset.

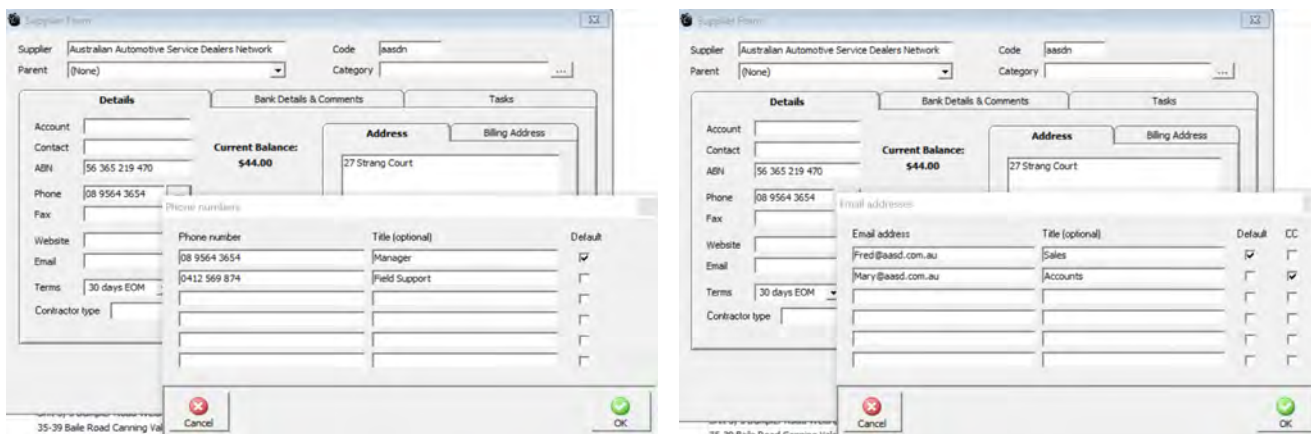


Suppliers

Suppliers, Phone Records: The supplier form has been modified to accommodate up to 6 mobile numbers either of which can be selected when sending an SMS from the task option within the supplier form. For ease of reference there is a free typing title field included against each record. To enter multiple phone numbers, go to the supplier form, select the button to the right of the mobile field, you will see you can now enter up to 6 mobile numbers, you also have the ability to free type a reference on the right-hand side under the title (optional) column. You will need to set one entry as a default, this will be the phone number used when no selection is initiated.

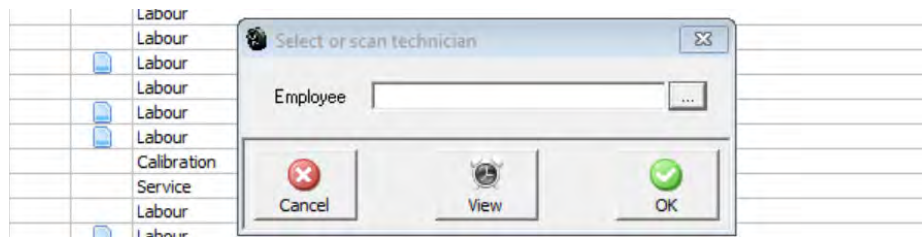
Suppliers, Email Addresses: Open the Supplier form, locate the email field down on the bottom left-hand side of the form, if you simply wish to record one email address type this into the empty field and it will become the default. If you want to record multiple addresses click on the button to the right of the email field, a sub screen is displayed, here you can record the address and use the title field (if you wish) to record a function ie: accounts, fleet manager, driver etc. To save your entries select OK (F12).

When you send emails from the supplier form on selecting the email option in tasks you will see a list of email addresses the default main and CC (if selected) are flagged as recipients. If you wish to alter this setting simply select or deselect from the checkboxes.



Time On \ Time Off

Clock On \ Off Shortcut: Version 3.8.0 introduces a shortcut to logging employees on \ off for the day, simply anywhere in the application select Shift & F11 this action will display clock on for the day form



Diary

The technician’s allocation screen inserts the technicians name on 2 x lines allowing for full display of the technician’s name.

Technician	Smith, John	Fred, Johnson	Longlastname, Albert
Available hours			
Allocated hours			
Remaining hours			
Last clock on/off			

Equipment Maintenance Register

Overview: The equipment form allows you enter the equipment description ie: Tyre Changer, manufacturers serial number, the maintenance type, frequency can be selected from a drop-down menu, the next date of service is automatically recorded based on last date service was completed plus the frequency. Initially the next service date is established by selecting the **Task** option from the bottom of the display. The Maintenance Task form allows you to establish who is going to be reminded of the task and when, enter any check-lists and make notes if applicable.

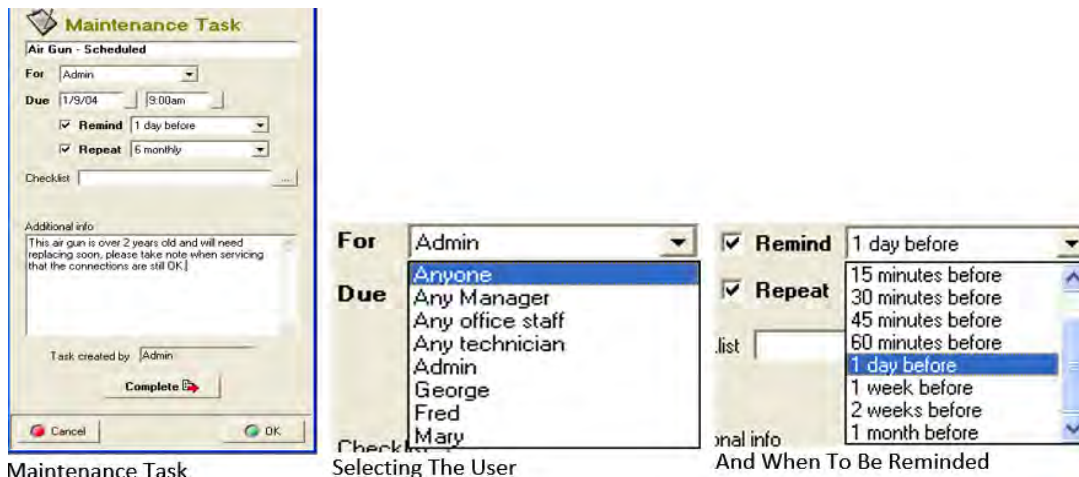
Accessing: To access the equipment maintenance option select **Activities \ Equipment Maintenance Register**, on opening you will see the equipment list.

New Item

Entering A New Item: A new item can be entered by selecting **yes** when prompted from the chart accounts or by selecting **new** from the bottom of the register display. Both these selections will open the equipment form.

To select the person user type you wish to be reminded when the task is due point and click on the down arrow to the right of the **For** field. A list of users and user types is displayed in the drop-down menu select the group or user by

pointing and double clicking on your selection. Enter the due date into the **Due** field by clicking on the button to the right and selecting from the calendar displayed, next select a time from the table. If you wish to be reminded point and click in the check-box select the arrow to the right of the **Remind** field point and double click on your selection from the drop-down menu. The repeat field will automatically display the service cycle entered onto the equipment form. If this has not yet been recorded select the arrow to the right of the **Repeat** field make your selection from the drop-down menu. If you wish to add a checklist to the maintenance task select the button to the right of the **Checklist** field.



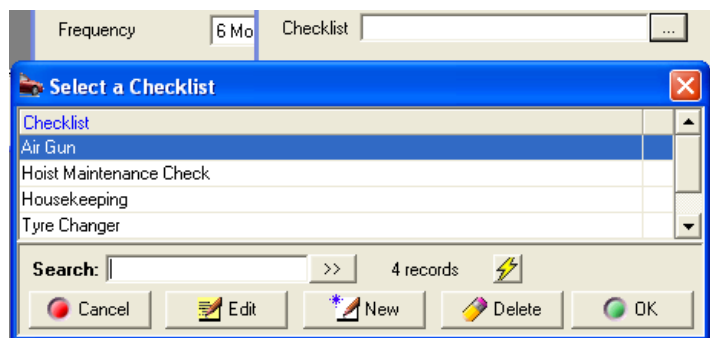
Maintenance Task

Selecting The User

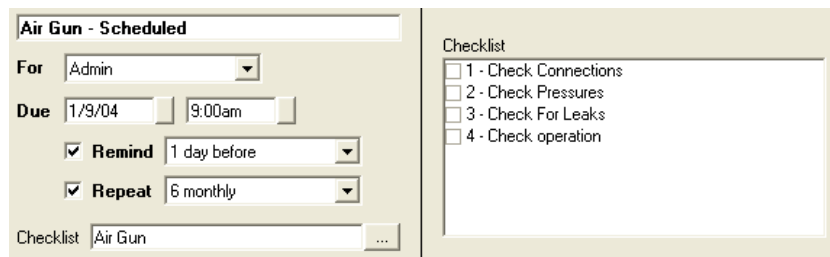
And When To Be Reminded

Checklists

Maintenance Task, Adding A Checklist: Automation allows you to store multiple checklists and attach a predetermined list to a maintenance task. The checklist is accessed by selecting the button to the right of the checklist field. You recorded checklist titles are displayed, to attach a checklist to a task highlight the entry and double click or select OK (F12) from the bottom of the list.



Checklists are made up of lines of text that are numbered; when a checklist is selected it becomes part of the task. The checks are displayed on the right hand of the task form when the **complete** option is selected. The individual checklist items can be ticked as completed by pointing and clicking in the checkbox next to the text. It is also possible to print the checklist by selecting the Checklist option from the bottom of the form.



Select the checklist option if you wish to print a checklist. It is also possible to make notes relating to the task in the text window located under the checklist.

Equipment Maintenance Register, Creating Checklists: To create a new checklist go to the select a checklist display and perform the following:

- 1) Select **New** from the bottom of the list
- 2) The checklist details form is displayed, to add an item select **Add**
- 3) **Type the line text** into the checklist item box and save with **OK (F12)**
- 4) Repeat item 3 for each line of the checklist to save the checklist select **OK (F12)**

#	Item
1	Check Electrical Connections
2	Check Chain For Tension
3	Grease pulley
4	Check Free Movement When Fully Lifted
5	Check Lifting Rubbers For Excessive Wear
6	Check Locking Device Operation
7	Operate & Report

Checklists, Editing & Moving Text: Edit functions allow you to make changes to the checklist text by highlighting the line and double clicking or selecting edit (F2) from the bottom of the display. Make your changes to the text in the checklist item box and save using OK (F12). It is also possible to re-order the line items by highlighting the check you wish to move and clicking on the up and down arrows to the right of the display.

Maintenance Task

Hoist - Electrical

For: Admin

Due: 20/8/04 10:00am

Remind: []

Repeat: Monthly

Checklist: Hoist Maintenance Check

Additional info:

Task created by: Admin

Complete []

Status: Complete

Checklist:

- 1 - Check Electrical Connections
- 2 - Check Chain For Tension
- 3 - Grease pulley
- 4 - Check Free Movement When Fully Lifted
- 5 - Check Lifting Rubbers For Excessive Wear
- 6 - Check Locking Device Operation
- 7 - Operate & Report

Completion notes:

Hoist will require new lifting rubber at the next service

Task completed by: Admin

Task completed on: 20/8/04 1:32pm

To delete a line highlight and select the remove function. To confirm completion of an item within a checklist point and click on the line a tick will be displayed in the checkbox. Enter your completion notes and save by selecting OK (F12).

Note: The task will always be completed by the current logged on user, the date and time is recorded as the form is saved.

Maintenance Task

Hoist - Electrical

For: Admin

Due: 20/8/04 10:00am

Remind: Remind

Repeat: Monthly

Checklist: Hoist Maintenance Check

Additional info:

Task created by: Admin

Status: Complete

Checklist:

- 1 - Check Electrical Connections
- 2 - Check Chain For Tension
- 3 - Grease pulley
- 4 - Check Free Movement When Fully Lifted
- 5 - Check Lifting Rubbers For Excessive Wear
- 6 - Check Locking Device Operation
- 7 - Operate & Report

Completion notes:

Hoist will require new lifting rubber at the next service.

Task completed by: Admin

Task completed on: 20/8/04 1:32pm

Buttons: Cancel, Complete, OK

Tasks

Tasks, Completing: To complete a task select the **complete** option from the bottom of the maintenance task form, checklist (if attached) and completion notes are now visible. **Note:** Tasks can be selected from either the Maintenance register or directly from the task manager. To open point and double click on the line entry. Maintenance tasks are identified in the task list on the left-hand side of the task manager.

Task Reminders, Pop Ups: Repco authorised users can set tasks to display pop up reminders, these are messages that are displayed at a set time before a task is due (set from the task form).

Drill - Compliance Details...

Due Friday, 20 August 2004 at 8:00am

Remind again in: 5 minutes Snooze Dismiss

There are four options available from the task reminder. Firstly, you can reset the remind again period by pointing and clicking on the arrow to the right on the field and selecting a new time period from the list secondly you can select the snooze option that will remove the reminder from the screen for the time displayed in the remind again field. You can dismiss (cancel) the reminder by selecting the dismiss option. Finally, if you wish to view / edit the task details select the details option.

Equipment Maintenance Register

Equipment	Frequency	Last Service	Next Service	Provider	Phone	Task
Air Gun	Six monthly		1/9/04	Electrical Maintenance Pty Ltd	08 9562 3232	Yes
Drill	Six monthly		20/8/04	Electrical Maintenance Pty Ltd	08 9562 3232	Yes
Hoist # 2	Six monthly		31/8/04	Equipment Maintenance	08 5632 3332	Yes
Hoist #1	Monthly			Electrical Maintenance Pty Ltd	08 9562 3232	Yes
Parts Washer	Quarterly		1/9/04	Equipment Maintenance	08 5632 3332	Yes
Tyre Changer	Quarterly		1/10/04	Equipment Maintenance	08 5632 3332	Yes

Buttons: Edit, New, Delete, Done

Editing An Entry: To edit a task go the equipment maintenance register or task manager and select the task make the necessary changes to the task and save with OK (F12)

Deleting An Entry: The task reminder can be deleted from the task manager by pointing and highlighting the entry and selecting the delete key on your keyboard. If you wish to delete an entry from the Equipment Maintenance screen highlight and select the delete option from the bottom of the display

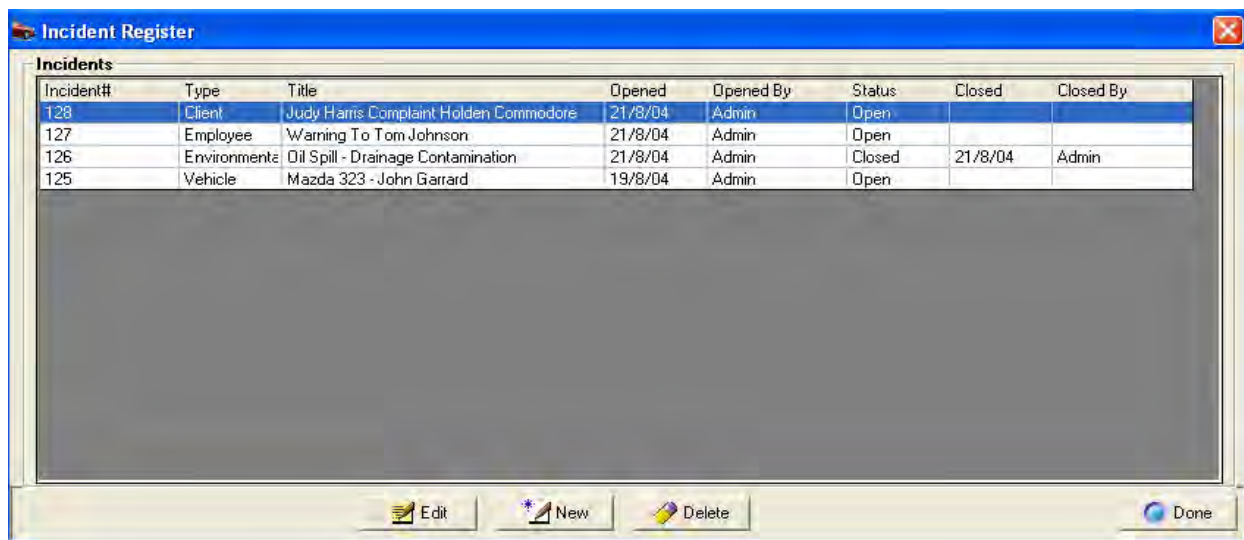
Incidents Register

Overview: The incident register allows you to record of actions taken when an incident occurs, this could take the form of an employee warning, vehicle accident, client complaint, environmental issues or a client complaint. The register provides you with a detailed report and the ability to attach actions in the form of notes or tasks to an incident.

The incident register is linked to the task manager so you can setup reminders for tasks relating to specified incidents to ensuring they are performed. All entries in are date and time stamped, an incident can be finalised and a detailed report produced giving the incident details and a list of actions taken.

The module is extremely useful if you require an audit tool that document actions relating to an incident in a logical easily referenced format.

Accessing: To access the incident register select **Activities** from the top of the screen, point and click on the **Incident Register** option displayed on the bottom of the drop-down menu. The main screen is displayed.



Incident#	Type	Title	Opened	Opened By	Status	Closed	Closed By
128	Client	Judy Harris Complaint Holden Commodore	21/8/04	Admin	Open		
127	Employee	Warning To Tom Johnson	21/8/04	Admin	Open		
126	Environmental	Oil Spill - Drainage Contamination	21/8/04	Admin	Closed	21/8/04	Admin
125	Vehicle	Mazda 323 - John Garrard	19/8/04	Admin	Open		

New Record

Incident, Creating a New Entry: To open a new incident click on the **new** option at the bottom of the display window, the incident report form will open. It is advisable that you complete all relevant details on this form; many of the options are checkboxes to select these items point at the box and mouse click a tick is displayed.

OH&S <input type="checkbox"/> Employee warnings <input type="checkbox"/> Vehicle accident <input type="checkbox"/> Client complaint <input type="checkbox"/> Environmental <input type="checkbox"/> Property damage <input type="checkbox"/> Other
--

The incident type field contains a drop-down pick list, to access point and click on the arrow to the right of the field. Make your selection by pointing and clicking on the option required, your choice is displayed in the incident type window. The incident type in displayed in the main register screen.

To save the form select OK (F12) from the bottom of the form. The incident will is displayed on your incident register screen with an open status. Selecting the action plan option will take you back to the incident summary from here you can create notes or a task.

Section A: Incident Details

Incident #	0002	Incident Type	Vehicle accident
Incident title	John Garrett - Vehicle XCV456		
Surname	Harris	Given name	John
Position title	Manager	Incident time/date	3/3/2005 8.50am
Witness name	Mary Jones	Witness contact #	08 9564 5566
Details	Vehicle reversing out of workbay #1 and hit a pole damage to the rear bumper and LHR tail light assembly		

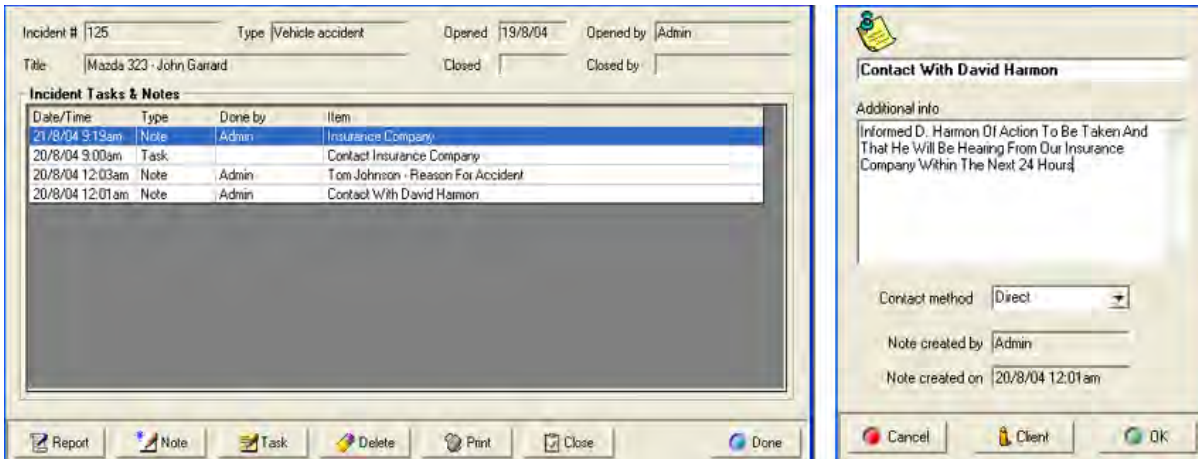
Injury record ▾

Section B: Injury Record - to be completed if incident involves any injury

Incident Reported	<input type="checkbox"/> Immediately	Severity of injury	<input type="checkbox"/> None	<input type="checkbox"/> Home	<input type="checkbox"/> WJ (work injury)		
	<input type="checkbox"/> Same day		<input type="checkbox"/> Return to work	<input type="checkbox"/> Hospital	<input type="checkbox"/> LTI (lost time injury)		
	<input type="checkbox"/> days following		<input type="checkbox"/> Doctor		<input type="checkbox"/> MTI (medical treatment injury)		
Part of body	<input type="checkbox"/> Head	<input type="checkbox"/> Ear	<input type="checkbox"/> Finger	Nature of injury	<input type="checkbox"/> Fracture	<input type="checkbox"/> Amputation	<input type="checkbox"/> Skin irritation
	<input type="checkbox"/> Leg	<input type="checkbox"/> Foot	<input type="checkbox"/> Toe		<input type="checkbox"/> Dislocation	<input type="checkbox"/> Laceration/cuts	<input type="checkbox"/> Other
	<input type="checkbox"/> Multiple	<input type="checkbox"/> Neck	<input type="checkbox"/> Shoulder		<input type="checkbox"/> Sprain	<input type="checkbox"/> Superficial	
	<input type="checkbox"/> Trunk	<input type="checkbox"/> Back	<input type="checkbox"/> Knee		<input type="checkbox"/> Concussion	<input type="checkbox"/> Bruises	
	<input type="checkbox"/> Arm	<input type="checkbox"/> Hand	<input type="checkbox"/> Ankle		<input type="checkbox"/> Burn	<input type="checkbox"/> Multiple	
	<input type="checkbox"/> Eye	<input type="checkbox"/> Other					
Contributing factors causing incident							
<input type="checkbox"/> Struck by moving object	<input type="checkbox"/> Striking against object	<input type="checkbox"/> Slips, trips and falls from height	<input type="checkbox"/> Insufficient training				
<input type="checkbox"/> Deficiency of plant or equipment	<input type="checkbox"/> Contact with chemicals/poisons	<input type="checkbox"/> Incorrect placement of materials or equipment	<input type="checkbox"/> Contact with product/material				
<input type="checkbox"/> Repetitive work method	<input type="checkbox"/> Vehicles	<input type="checkbox"/> Contact with hot or cold substances	<input type="checkbox"/> Hazard not identified				
<input type="checkbox"/> Exposure to noise	<input type="checkbox"/> Incorrect work method	<input type="checkbox"/> Pulling, pushing, lifting, carrying object	<input type="checkbox"/> Other				
<input type="checkbox"/> Exposure to fumes, mist, vapour or dust	<input type="checkbox"/> Slips, trips and falls from same level						

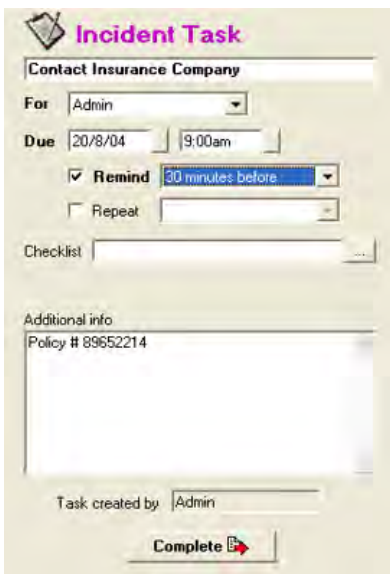
Notes

Adding A Note: Point and click on the line item from the register, the incident summary form is in view, this form lists by date and time notes and tasks recorded against the incident to add a note select the **Note:** Clicking on the Action Plan button will open the incident summary from here you can enter notes and tasks.



Give your note a title, enter your text into the body of the form, select the arrow to the right of the contact method field, point and click on the contact type ie: Letter. Save your note by selecting OK (F12). The created by and created on fields will automatically display today's date and time and the identity of the logged-on user.

Adding A Task: Select the **Task** option from the bottom of the incident summary list, this action displays the task form.



To select the person user type you wish to be reminded when the task is due point and click on the down arrow to the right of the **For** field. A list of users and user types is displayed in the drop-down menu select the group or user by pointing and double clicking on your selection. Enter the due date into the **Due** field by clicking on the button to the right and selecting from the calendar displayed, next select a time from the table. If you wish to be reminded point and click in the check-box select the arrow to the right of the **Remind** field point and double click on your selection from the drop-down menu. If you wish to repeat the task on a regular basis select the **Repeat** option, select the arrow to the right of the field and make your selection from the drop-down menu.

To add a **Checklist**, select the button to the right of the Checklist field. This action opens your list of checks to insert highlight the entry and confirm with OK (F12) the checklist title is now displayed in the checklist field. To create a new checklist, select new from the bottom of the checklist display and add your line items, adjust order if required and save with OK (F12).

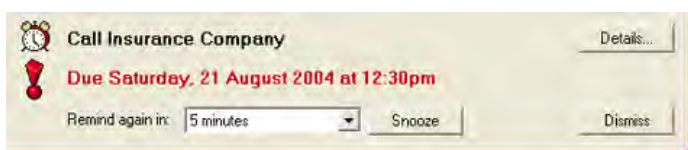
Tasks

Completing A Task: To complete a task, selection can be made from either the Incident Summary list or task list from the task manager. Point and click on the line item, select the complete option, mark the individual checks completed (if attached) make your notes in the field provided, save with OK (F12).

Editing a Task or Note: Tasks or notes can be edited from the incident summary screen by pointing and clicking on the line item, executing the changes and saving with OK (F12). An incident task can also be accessed for editing from the task manager, again point and click on the line item, make your changes and save with OK (F12).

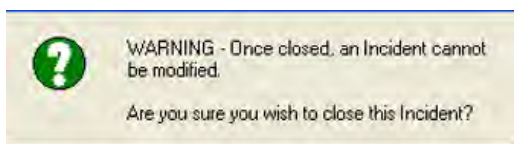
Deleting a Task or Note: To delete an item from the incident summary highlight the line item and select delete from the bottom of the display, confirm your intention when prompted. If you delete a task from the incident summary it will also be removed from the task manager. To delete a task from the task manager, highlight and select the delete key on your keyboard, confirm your intent when prompted. The task will also be deleted from the Incident summary.

Task Reminders: There are four options available from the task reminder. Firstly, you can reset the Remind again period by pointing and clicking on the arrow to the right on the field and selecting a new time period from the list. Secondly you can select the snooze option that will remove the reminder from the screen for the time displayed in the Remind again field.



You can dismiss (cancel) the reminder by selecting the dismiss option. Finally if you wish to view / edit the task details select the details option.

Incident Register, Closing an Incident: When all notes and tasks are completed for a particular incident it is necessary to close the report. Highlight the incident; select the **Close** option from the bottom of the Incident Summary display, confirm your action by selecting yes from the close incident prompt.



Note: Once closed no changes can be made to any of the documentation related to the incident.

Security: For a user to have access to the incident register the option incident register option must be selected in the security profile **Incident Report, Printing:** The incident report is printed from the Incident Summary screen. Highlight the incident you wish to report on and select the **Print** option from the bottom of the display.

Incident Tasks & Notes

<u>Date/Time</u>	<u>Type</u>	<u>Done By</u>	<u>Item</u>
21/8/04 12:30pm	Task		Call Insurance Company
21/8/04 9:19am	Note	Admin	Insurance Company
20/8/04 12:03am	Note	Admin	Tom Johnson - Reason For Accident
20/8/04 12:01am	Note	Admin	Contact With David Harmon

In addition to the original details entered when the incident was created a list of tasks and notes are printed.

Incident Register, Deleting An Incident: To delete an incident highlight the record from the Incident Register screen, select Delete from the bottom of the display, confirm your intention when prompted.

STP Phase 2

Single touch payroll phase 2 is still work in progress, most of the Automation coding is complete and we are currently using the ATO test channel to evaluate the accuracy of the transfer. The ATO have yet to sign off on the structure of the new file so we were unable to include the function in our 3.8.0 release. This version will continue to use the authorised ATO Phase 1 channel, due to this circumstance

Microbase has been granted a deferral till 30 April 2022, under the **ATO deferral notice 878 952 16**, please quote this reference if the tax office queries why you are not transferring phase 2 data.

Development, testing and authorisation from the ATO will be completed prior to that date. In the interim all Automation Premium users are exempt under the terms and conditions of our deferral from their obligations to transfer STP data in phase 2 format from January 1st 2022. We envisage that in late March 2022 or before we will distribute Version 3.8.1 which will transfer STP data in the phase 2 format.