

Auto Care Software

Version 14.00

PREMIUM
MANUAL

www.autocaresoftware.com.au

Contents

BUSINESS INTERNET BANKING MODULE	3
SETTING UP THE BUSINESS INTERNET BANKING MODULE	3
Entering Bank Details into Auto Care Software	4
Entering Your Suppliers' Bank Details.....	6
Entering Creditors' Bank Details in the Make a Payment Module	7
Entering Your Employees' Bank Details.....	7
PROCESSING PAYMENTS BY INTERNET BANKING	8
Supplier Payment Module	8
Make a Payment Module.....	10
Payroll Module.....	10
Creating Business Internet Banking Transfer File	11
Saving a Business Internet Banking File	13
Deleting a Business Internet Banking File.....	14
SMS MODULE	16
Receiving SMS Messages	18
SENDING AND RECEIVING SMS MESSAGES ON CUSTOMER INVOICE.....	19
INTERNAL WORKSHOP JOB MODULE (IWJ)	21
ACTIVATING THE INTERNAL JOB MODULE.....	21
Card File Set-up (initially only).....	21
Creating Stock Codes for Internal Jobs.....	22
USING THE INTERNAL JOB MODULE	22
Warranty / Build ID Numbers.....	24
Invoicing Internal Job Products	24
Return or re-work of an Internal Job Item.....	26
COST CENTRES	27
Configuring your cost of sales accounts.....	27
• To activate your new settings click on the Set all Stock item, Billing Code and Assembly codes in Stock table using account codes selected above button.	28
To Set Sales and Cost of Sales accounts for stock categories follow the steps below:	29
JOB/TIME RECORDING AND REPORTS MODULE	32
REQUIREMENTS AND SET UP.....	32
GENERAL OPERATION AND REPORTING	37
Job / Time Report by Technicians	41
Job / Time Report by Jobs	42
Job / Time Report by Job Number.....	43
Productivity report by Employee and/or Department	44

INTRODUCTION

Auto Care Software Version 14 Premium is an advanced form of *Auto Care Software Version 14*. This comprehensive package has all the modules included in *Auto Care Software 14*. In addition it provides you with the following new features:

- Business Internet Banking module
- Send and Receive SMS text messages (conditions apply)
- Internal Jobs module
- Option to create Cost Centres
- Job Time Recording module.

Business Internet Banking Module

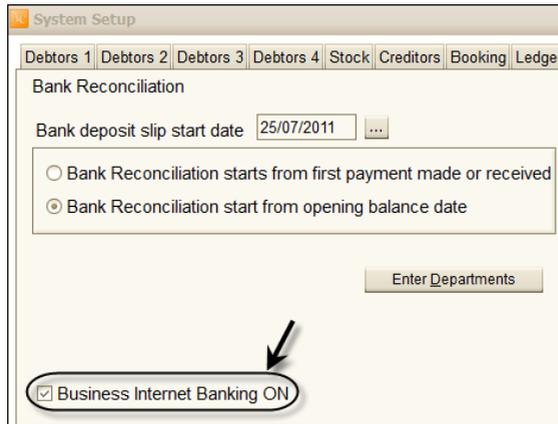
Business Internet Banking is for you if you have Internet access and you would like to pay your suppliers and employees electronically without too much hassle. Auto Care Software will create a standard data file with all payment transactions. All banks and financial institutions in Australia accept this data file. It can contain up to 500 credits (payments). You can login to your Bank website and upload the transaction file you have just created. If you have dozens of transactions at the end of the month or any other time, this module will save you considerable time.

To use this module you need to have a contract with your bank, which specifies the account or accounts you will use for fund transfers. You can use accounts held at different financial institutions.

Your bank or financial institution will provide you with a *Direct Entry* user ID and a Bank Code. You have to enter them in Auto Care Software.

Setting up the Business Internet Banking Module

On the main menu screen select “**SYSTEM**”. Click “**System Setup**” and select “**System3**” page. Tick on the “**Business Internet Banking**” check box to turn this feature on. Click “**Exit**” to return to the main menu screen.



On the main menu screen select **“SYSTEM”**. Click **“Operators and Passwords”** and select the operator who is permitted to use this module. Tick the **“Internet Banking”** check box for this operator. Click **“Exit”** to return to the main menu screen.



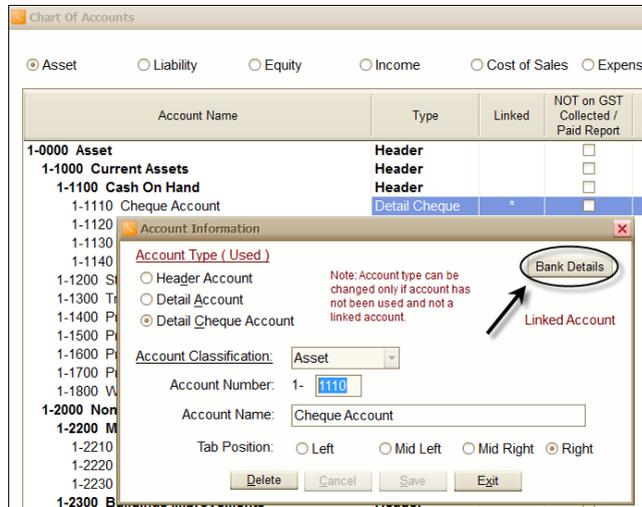
Entering Bank Details into Auto Care Software

In order to use the Internet Banking module you have to enter bank details for both your company and your creditors. You will enter bank details in the following modules:

- General Ledger - to enter your company’s bank details
- Supplier Card Files - to enter your suppliers’ bank details
- Make a Payment module - to enter bank details for those creditors who you pay in this module
- Payroll module - to enter your employees’ bank details.

Entering your company's bank details

To enter your bank details, click “**General Ledger**” on the main menu screen and click on the “**Chart of Accounts**” icon. Select the account you are going to use for Internet banking and click “**Edit**”. On the *Account Information* screen click on the “**Bank Details**” button.



The *Bank Details* dialog box appears. You have to enter the following information in the relevant fields:

- **BSB number**: This is 7 characters long with a hyphen in position 4. Enter leading zeros.
- **Account Number**: This is maximum 9 characters long. If it does not fit into the field take the hyphen out.
- **Financial Institution Abbreviation**: This is the “bank code” that you receive from your bank (maximum 3 characters).
- **User Name**: This is the user-preferred name as advised on your Internet Banking application.
- **User ID Number assigned by APCA**: This is the User Identification Number, which is assigned by APCA (Australian Payments Clearing Association) and your Financial Institution. It is maximum 6 characters long (enter leading zeros).

- Description of entries: This will appear in the first line of your transfer file. It is the name of your transfer file as well. Enter different names to different accounts! (Cannot be longer than 12 characters.)
- Name of Remitter: This is 16 characters long and helps to identify each line in the body of your transfer file.

Bank Details

1-1110 Cheque Account Exit

BSB please enter leading zeros

Account

INTERNET BANKING DETAILS

Financial Institution Abbreviation

User Name

User ID Number assigned by APCA please enter leading zeros

Description of entries .aba file name

Name of Remitter

Entering Your Suppliers' Bank Details

Next you have to enter the bank details for each of your suppliers. In the Suppliers Card files click on **"Bank Details"**.

Customer Invoice | Quotation | Stock | Purchase Order | Supplier Invoice | Customers | Suppliers | Booking Diary

SUPPLIER INFORMATION

CONTACT INFORMATION COMMENT

Name Edit

Contact

Phone

Mobile

Fax

e-mail / Purchase

e-mail / Remittance

Address

Suburb

ABN

Supplier Bank Details Exit

BANKING DETAILS

BSB please enter leading zeros

Account Number

Title of account to be paid

Business Internet Banking

Indicator Leave it empty or select code based on your Business Internet Banking contract.

Transaction Code Leave it to 50 or select transaction code based on your Business Internet Banking contract.

Expense only Active Inactive

Click on the “**Business Internet Banking**” check box and enter the required data into each field.

Entering Creditors’ Bank Details in the Make a Payment Module

To enter your payees’ bank details, click “**General Ledger**” on the main menu screen and click on the “**Make a Payment**” button. Click “**Find**”, select “**Payee**” and click “**OK**”. Select the payee for which you want to enter the bank details and click “**OK**”. Click on any of the cheques on the list and click “**OK**”. Click on the “**Bank Details**” button on the top right hand side of the screen to display the *Make a Payment Bank Details* window and enter bank details for each creditor.

The screenshot shows a software window titled "Make a payment" with a sub-window titled "MAKE A PAYMENT". The main window contains fields for "Payee" (VIP HOME SERVICES), "Date" (16/10/2013), "Cheque / Ref." (Make a Payment Bank Details), and "Amount Total \$" (VIP HOME SERVICES). A list of cheques is visible on the left, with "6-4030 Cleaning" selected. The "Banking Details" sub-window is open, showing fields for "BSB" (012-333), "Account Number" (132165498), and "Title of account to be paid" (VIP HOME SERVICES). It also includes checkboxes for "Business Internet Banking", "Indicator", and "Transaction Code" (50). The "Bank Details" button in the top right of the main window is circled and pointed to by an arrow.

Entering Your Employees’ Bank Details

To enter your employees’ bank details, select “**Utility/Payroll**” on the main menu screen. Select “**Employees Card File**” page and click on the “**Bank Details**” button. Enter Bank details for each employee.

Employee Information

Card Details | Payroll Information | Payroll History | Entitlements

Last Name: Gordon First Name: Michael Title: MR

Start date: 01/05/2013 Termination date: []

Award Name: Vehicle Manufactur Location: Address1 Address: 56 Burtun Court Suburb: ELIZABETH State: SA Country: []

Emergency Contact Details: Sue Gordon - 0408

Employee Bank Details

Gordon, Michael [Cancel / Exit]

BANKING DETAILS

BSB: 035-059 please enter leading zeros
 Account Number: 12345698
 Title of account to be paid: M & J Gordon

Business Internet Banking
 Leave it empty or select code based on your Business Internet Banking contract.

Indicator: []
 Transaction Code: []
 Leave it to 50 or select transaction code based on your Business Internet Banking contract.

[Save / Exit]

[Bank Details]

Processing Payments by Internet Banking

Supplier Payment Module

If you pay several invoices together, enter an identification code to the *Cheque/Reference* field. In this way their total will be displayed as one transaction in the Business Internet Banking file. Note that the Business Internet Banking box is automatically checked if banking details have been entered for a supplier.

Supplier Payments...

AUTO BRAKE SERVICE [Process Payment and Exit] [Cancel]

Date: 31/10/2013 Cheque/Reference: 31/10/2013

Account: 1-1110 Cheque Account Lodgement Refr. Amount Paid: 446.09

Suppl. Inv. No.	Invoice ID	Invoice date	Note	Total Invoice	Already Paid	Pay	Current Payment
ABS5678	73	25/09/2013		83.50	0.00	<input checked="" type="checkbox"/>	83.50
ABS7981	74	16/10/2013		179.55	0.00	<input checked="" type="checkbox"/>	179.55
ABS8999	79	21/10/2013		183.04	0.00	<input checked="" type="checkbox"/>	183.04

Pay AUTO BRAKE SERVICE
 Pay CAPRICORN SOCIETY LIMITED

Payable: 446.09 Total Payment: 446.09

Business Internet Banking

In the Business Internet Banking file it will be one transaction line.

The screenshot shows the 'Business Internet Banking' window with a '1-1110 Cheque Account' selected. The transaction table contains one entry:

BSB	Account Number	Indicator	Transaction	Amount	Title of Account to be debited	Lodgement Reference	Payment Confirmed	Payment Source	Payment Date
012-323	123456789		50	446.09	CAPRICORN SOCIETY LIM...	31/10/2013 AUTO BR	<input checked="" type="checkbox"/>	SUPPL	31/10/2013

Note the *Lodgements Reference* column includes 31/10/2013 and part of the supplier's name (maximum 18 characters). This *Lodgements Reference* will be used by the financial institutions for statement narrative.

If you want to pay these invoices separately, you have to leave the *Cheque/Reference* field empty.

The 'Supplier Payments...' dialog box shows the 'AUTO BRAKE SERVICE' account. The 'Cheque/Reference' field is empty, and the 'Amount Paid' is 446.09. Below is a table of invoices:

Suppl. Inv. No.	Invoice ID	Invoice date	Note	Total Invoice	Already Paid	Pay	Current Payment
ABS5678	73	25/09/2013		83.50	0.00	<input checked="" type="checkbox"/>	83.50
ABS7981	74	16/10/2013		179.55	0.00	<input checked="" type="checkbox"/>	179.55
ABS8999	79	21/10/2013		183.04	0.00	<input checked="" type="checkbox"/>	183.04

In this case, in the Business Internet Banking transfer file all three invoices will appear separately. The Lodgements Reference includes the Supplier invoice number and part of the Supplier's name (maximum 18 characters).

The screenshot shows the 'Business Internet Banking' window with a '1-1110 Cheque Account' selected. The transaction table contains three entries, each corresponding to one of the invoices from the previous screenshot:

BSB	Account Number	Indicator	Transaction	Amount	Title of Account to be debited	Lodgement Reference	Payment Confirmed	Payment Source	Payment Date
012-323	123456789		50	83.50	CAPRICORN SOCIETY LIM...	#4851 AUTO BRAKE S	<input checked="" type="checkbox"/>	SUPPL	31/10/2013
012-323	123456789		50	179.55	CAPRICORN SOCIETY LIM...	#4852 AUTO BRAKE S	<input checked="" type="checkbox"/>	SUPPL	31/10/2013
012-323	123456789		50	183.04	CAPRICORN SOCIETY LIM...	#4853 AUTO BRAKE S	<input checked="" type="checkbox"/>	SUPPL	31/10/2013

Make a Payment Module

You can have several items on the Make a Payment page, but it will always be processed as one payment. Enter the lodgement reference (maximum 18 characters) in to the *Lodgements Reference* Field.

MAKE A PAYMENT

Payee: ADVERTISING Date: 31/10/2013 Bank Details Payment No.: 24

Cheque / Ref.: Ref: 24 1-1110 Cheque Account

Amount Total \$: 165.00 New Line [F9] or Right Click on the Grid Lodgement reference: YPAGE ADV 2013

Expenses	Amount	GST Code	Description	Excl. GST	GST	Incl. GST
6-4010 Advertising	165.00	INCL		150.00	15.00	165.00

Business Internet Banking

1-1110 Cheque Account Change Bank Account Evaluate Save Clear Screen Exit

Find Archive Internet Banking Files

BSB	Account Number	Indicator	Transaction	Amount	Title of Account to be debited	Lodgement Reference	Payment Confirmed	Payment Source	Payment Date
012-323	123456789		50	83.50	CAPRICORN SOCIETY LIM...	#4851 AUTO BRAKE S	<input checked="" type="checkbox"/>	SUPPL	31/10/2013
012-323	123456789		50	179.55	CAPRICORN SOCIETY LIM...	#4852 AUTO BRAKE S	<input checked="" type="checkbox"/>	SUPPL	31/10/2013
012-323	123456789		50	183.04	CAPRICORN SOCIETY LIM...	#4853 AUTO BRAKE S	<input checked="" type="checkbox"/>	SUPPL	31/10/2013
012-232	123456789		50	165.00	ADVERTISING	YPAGE ADV 2013	<input checked="" type="checkbox"/>	PAYM	31/10/2013

Payroll Module

When you process a pay advice, the payment number and employee's name will be displays in the Note/Reference field automatically. Note that if you use the internet banking for paying an employee than you cannot use this field for entering notes.

Pay Employee | Employee Card file | Payroll Categories | PayrollReports

Pay from Account: 1-1120 Payroll Cheque Account Payment ID: 102 Employee ID: []

Employee: WHITE, MARY Payment Date: 31/10/2013 Payroll Year: []
 Location: 15 Castle Street, ATHELSTONE SA 5076 Pay Period Start: 25/10/2013 Pay Period End: 31/10/2013
 Note / Reference: Proll#102WHITE, MA

Description	Hours	Account	Amount	Category
Base Hourly	38.00	6-6020 Wages - Salaries	760.00	Wages
PAYG Withholding		2-1420 PAYG Withholding Tax Payable	-95.00	Taxes
ENTITLEMENTS				
Wages - Holiday Leave Accrual	2.923			Entitlements
Wages - Sick Leave Accrual - 2 Plus	1.169			Entitlements
EMPLOYER EXPENSES				
Superannuation - Wages		Debit: 6-6300 / Credit: 2-1460	68.40	Expenses

Business Internet Banking BIB Date: [] Gross Pay: 760.00 Net Pay: 665.00

Creating Business Internet Banking Transfer File

In the General Ledger module click on the **Business Internet Banking** command button.



Select the account you want to make the payment from and click **“Evaluate”**.

The screenshot shows the 'Business Internet Banking' window. At the top, there is a '1-1110 Cheque Account' field and several buttons: 'Change Bank Account', 'Evaluate', 'Save', 'Clear Screen', and 'Exit'. Below these is a 'Find Archive Internet Banking Files' button. The main area contains a table with the following columns: BSB, Account Number, Indicator, Transaction, Amount, Title of Account to be debited, Lodgement Reference, Payment Confirmed, Payment Source, and Payment Date. The table lists five transactions, all with 'Payment Confirmed' checked. At the bottom, there are two summary fields: 'Total of Confirmed Payments' with a value of 1,276.09 and 'Number of Confirmed Payments' with a value of 5.

BSB	Account Number	Indicator	Transaction	Amount	Title of Account to be debited	Lodgement Reference	Payment Confirmed	Payment Source	Payment Date
012-323	123456789		50	83.50	CAPRICORN SOCIETY LIM...	#4851 AUTO BRAKE S	<input checked="" type="checkbox"/>	SUPPL	31/10/2013
012-323	123456789		50	179.55	CAPRICORN SOCIETY LIM...	#4852 AUTO BRAKE S	<input checked="" type="checkbox"/>	SUPPL	31/10/2013
012-323	123456789		50	183.04	CAPRICORN SOCIETY LIM...	#4853 AUTO BRAKE S	<input checked="" type="checkbox"/>	SUPPL	31/10/2013
123-456	693654987			665.00	MARY WHITE	PROLL#103WHITE, MA	<input checked="" type="checkbox"/>	PROLL	31/10/2013
012-232	123456789		50	165.00	ADVERTISING	YPAGE ADV 2013	<input checked="" type="checkbox"/>	PAYM	31/10/2013

Total of Confirmed Payments: 1,276.09
 Number of Confirmed Payments: 5

In the *Lodgments Reference* column you can enter or modify a lodgment reference. It will be used by the financial institution as statement narrative.

If you do not want to pay a particular item, un-check the **“Payment Confirmed”** check box.

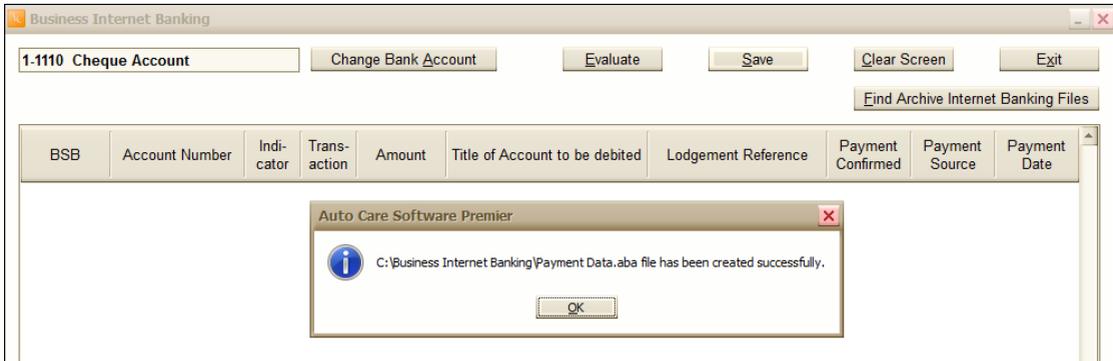
The *Payment Source* column shows the origin of a line. (SUPPL refers to Supplier Payment; PAYM to Make a Payment and PROLL to Payroll.)

The *Payment Date* column shows the payment date. (This date is used in the General Ledger.)

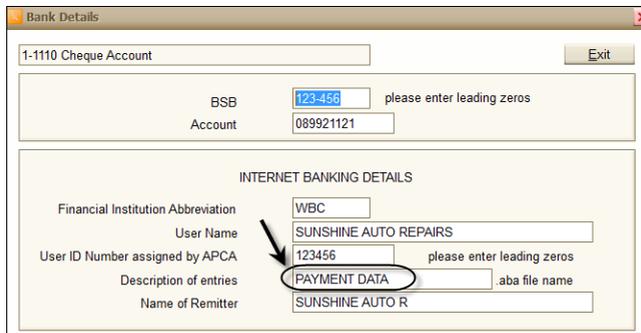
Note that the number of confirmed payments cannot exceed 500 in any one batch.

Saving a Business Internet Banking File

To save a Business Internet Banking file, click on the **“Save”** command button. Auto Care software will display the message that the file has been saved in the BUSINESS INTERNET BANKING folder of the C: drive.

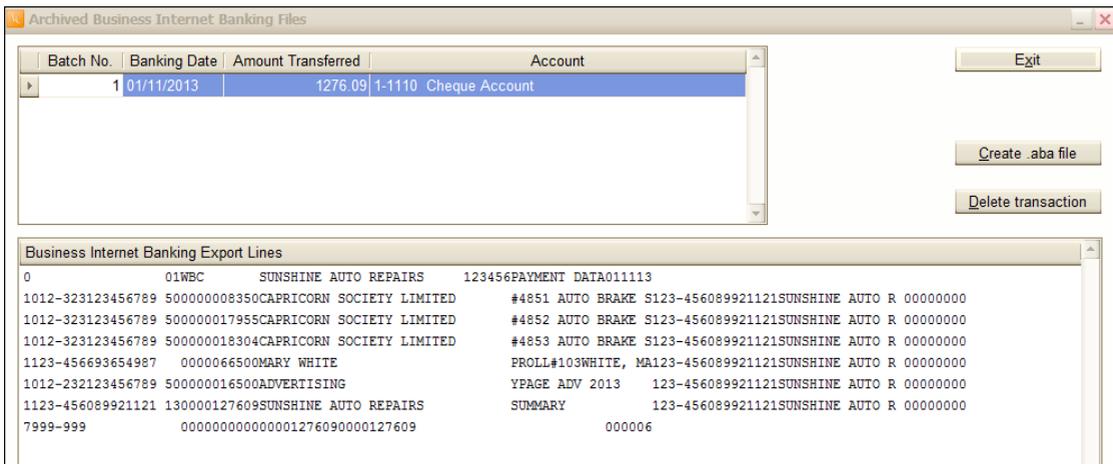


The file's name is "Payment Data.aba". This is the file that you have to upload to your financial institution web site.

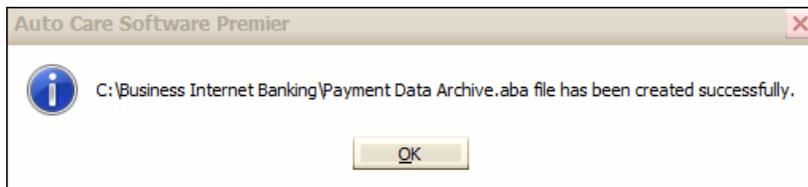


Each file will be archived and can be viewed at and printed any time. Click on "Find Archived Internet Banking Files" to find a file.





The file can be printed or exported to a format requested by the bank by clicking on the **Create .aba file**.



Note that if you create a payment transaction file in this dialog box, the file name will include the word “Archive”.

Deleting a Business Internet Banking File

In case you need to delete an .aba file, click on the **“Delete transaction”** button. Click **Accept** and **Yes**. Note that an extra line item will be added to the deleted batch displaying the date and time of the deletion and the person who deleted the batch.

Archived Business Internet Banking Files

Batch No.	Banking Date	Amount Transferred	Account
1	01/11/2013	1276.09	1-1110 Cheque Account

Business Internet Banking Export Lines

```

0          01WBC      SUNSHINE AUTO REPA
1012-323123456789 500000008350CAPRICORN SOCIETY
1012-323123456789 500000017955CAPRICORN SOCIETY
1012-323123456789 500000018304CAPRICORN SOCIETY
1123-456693654987 0000066500MARY WHITE
1012-232123456789 500000016500ADVERTISING
1123-456089921121 130000127609SUNSHINE AUTO REPA
7999-999          000000000000012760900001276
  
```

Delete Business Internet Banking Transaction.

If .aba file has been uploaded you might end up paying expenses twice. Are you sure of deleting this transaction?

Batch Number: 1
Banking date : 01/11/2013
Amount transferred: \$1,276.09
Account Name: 1-1110 Cheque Account
Name of Operator who deletes this transaction: ANDRAS

Accept Decline

Yes No

Create .aba file

Delete transaction

Exit

TO R 00000000
TO R 00000000

Business Internet Banking Export Lines

```

0          01WBC      SUNSHINE AUTO REPAIRS      123456PAYME
1012-323123456789 500000008350CAPRICORN SOCIETY LIMITED      #4851
1012-323123456789 500000017955CAPRICORN SOCIETY LIMITED      #4852
1012-323123456789 500000018304CAPRICORN SOCIETY LIMITED      #4853
1123-456693654987 0000066500MARY WHITE                          PROLL
1012-232123456789 500000016500ADVERTISING                        YPAGE
1123-456089921121 130000127609SUNSHINE AUTO REPAIRS          SUMMA
7999-999          00000000000001276090000127609
Transaction has been deleted on Nov  1 2013  3:48PM by ANDRAS
  
```

SMS Module

The SMS module enables you to send standard or personalised text messages to your customers from Auto Care Software's Booking Diary, Customer Invoice and Marketing modules without touching a mobile phone by using your computer keyboard and mouse.

For example, you can set up standard messages in the **Booking Diary** module to confirm bookings or convey other information to your clients. You send the following message to your customer:

"We confirm that your vehicle is booked into our workshop on – Tuesday 22nd January 2013. Sunshine Auto Repairs. Please reply."

Your client will receive this message within 2 minutes. He may reply:

"Thanks, will be there at 8am. John"

You will receive this reply in *Auto Care Software* and if action is required, you could send a second message.

Based on the same principle, you can set up standard messages in the *Customer Invoice* and Marketing modules. For example, you can send the following message to your customer:

"Your vehicle is ready to collect. Sunshine Auto Repairs"

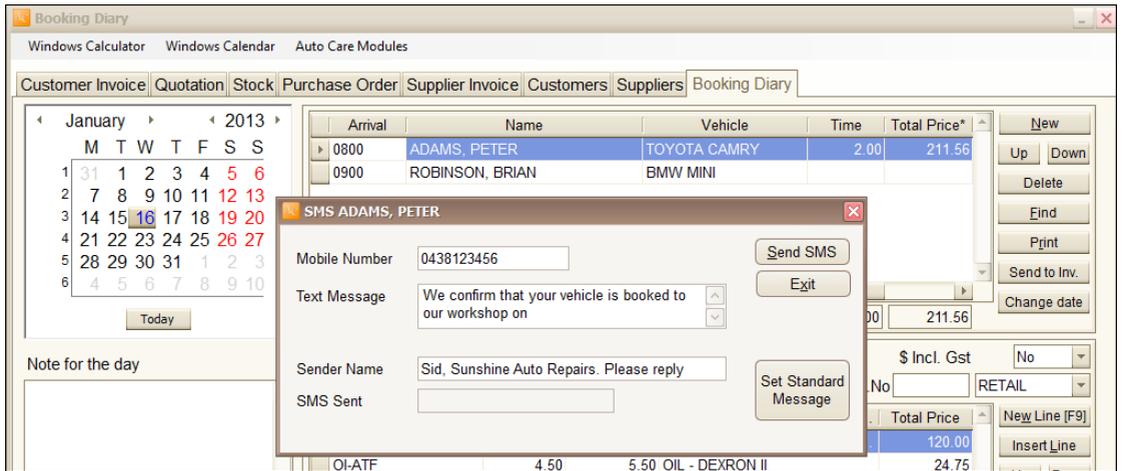
In order to use the *Auto Care Software* SMS feature, you need to have:

- Broadband internet connection
- A contract with *Silver Messages* for broadcasting your messages (Data Development owns Silver Message. For contract details please call your local agent or dial 08 8396 5605).

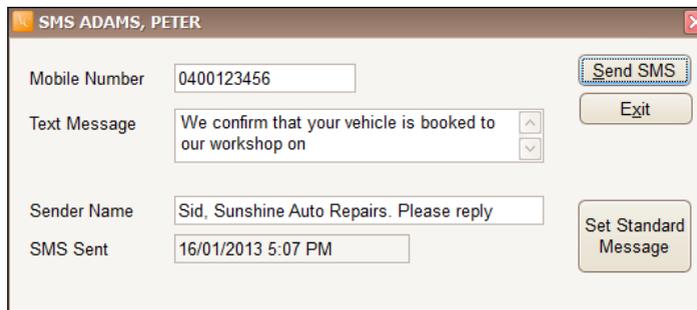
Sending SMS Messages in the Booking Diary

To send a message from the **Booking Diary** module, follow steps below:

- Click on the **Booking Diary** button on the Auto Care Software main menu screen.
- Select the client who you want to send an SMS to and click on the **Send SMS** button to display the **SMS** dialog box.



- Enter your text message and click on the **Send SMS** button. The **SMS Sent** field now displays the date and time when the message was sent.



Creating standard messages

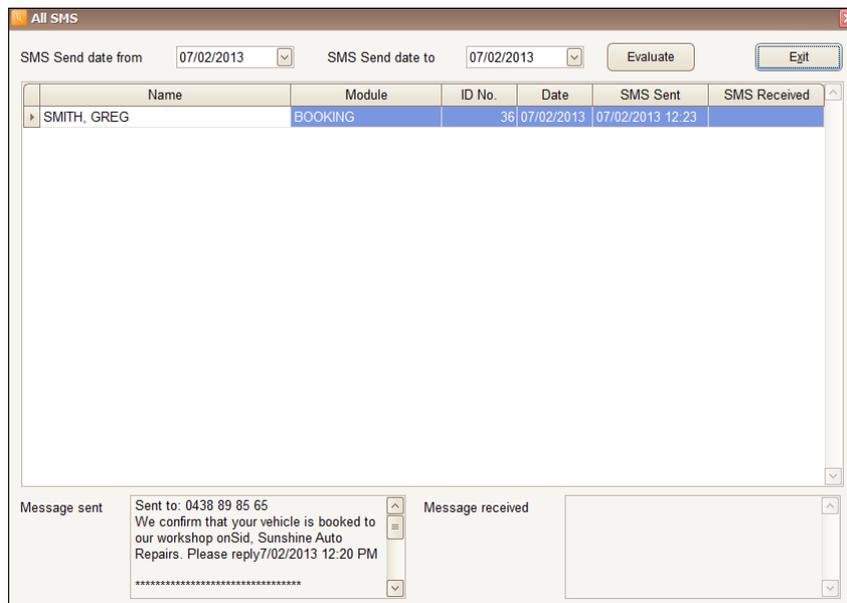
- To create a standard message, click on the **Send SMS** button.
- The SMS dialog box appears. Click on the **Set Standard Message** button. A window pops up where you can set a standard message. This message will automatically be displayed in the **SMS** dialog box every time you click on the **Send SMS** button on the **Booking Diary** screen. Note that this message can be modified if needed at the time of sending an SMS. Click **Exit** to return to the **SMS** dialog box.



- Click **Exit** to return to the Booking Diary.

Receiving SMS Messages

- To receive SMS messages, click on the **Receive SMS** button on the *Booking Diary* screen. If there are messages received they will be downloaded onto your computer. The received messages can be viewed in a window similar to the **See All SMS** window, included below. You can look up the received messages at any time.



- To display sent and received messages for a selected client only, select the client on the list on the **Booking Diary** screen and click on the **See this SMS** button.

SMS ROBINSON, BRIAN

Text Message sent: We confirm that your vehicle is booked to our workshop on Sid, Sunshine Auto Repairs. Please reply 24/01/2013 2:21 PM

Number of Messages sent: 1

Last SMS Sent: 24/01/2013 2:22:00 PM

Message received: Thanks. I will be there at 8.00 am, Brian Received on 24/01/2013 2:24 PM

SMS Received: 24/01/2013 2:25:00 PM

Exit

Sending and Receiving SMS Messages on Customer Invoice

Sending and receiving SMS messages from the customer invoice module is based on the same principle as sending and receiving SMS in the booking diary.

Customer Invoice | Quotation | Stock | Purchase Order | Supplier Invoice | Customers | Suppliers | Booking Diary

Customer Information | Job No. 130 | **Vehicle Information**

Name: SMITH, GREG | Vehicle: TOYOTA CAMRY | Registration: 2STW321
 Address: 55 JUNCTION ROAD | Kilometre: 19650 | Next service:
 Address2: | Repeat:
 Suburb: MANSFIELD PARK SA 5012 | Additional Invoice Information
 Ph. Work: 08 8321 1256 | Fax: | Account Status: | Inv. Number: 130 | Invoice date: 14/12/2012
 Contact: | Price: RETAIL | CASH | Ord/Ref No: 3256 | Print Date: 14/12/2012
 Technician: MG | * \$ Incl. Gst: Yes

Send SMS | **Receive SMS** | **See All SMS** | **JOB INFORMATION** | Work completed

Code	Qty	Unit Price *	Description *** New line [F9] ***	On Hand	Unit	Total Price *
SERV-A	1.00	132.00	(A) SERVICE. 10,000 KM. 6 MTHS.		EACH	132.00
OI-ATF	4.50	6.05	OIL - DEXRON II	-22.00		27.23

New Line [F9] | **Insert Line** | **Up** | **Down**

Sending and Receiving SMS Messages in the Marketing Module

Sending and receiving SMS messages from the customer invoice module is based on the same principle as sending and receiving SMS in the booking diary.

Next Service Reminder...

Next service reminder

Date from: 01/02/2013 to: 28/02/2013 Evaluate

Name	Due Date	Vehicle	Registration	Send	Print, E-mail, SMS	Sent
ADAMS, PETER	05/02/2013	TOYOTA HILUX	WOS 789	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Print <input type="radio"/> E-mail <input checked="" type="radio"/> SMS	Yes
SMS ADAMS, PETER				<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Print <input type="radio"/> E-mail <input type="radio"/> SMS	No
				<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Print <input type="radio"/> E-mail <input type="radio"/> SMS	No
				<input checked="" type="checkbox"/>	<input type="radio"/> Print <input type="radio"/> E-mail <input checked="" type="radio"/> SMS	No
				<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Print <input type="radio"/> E-mail <input type="radio"/> SMS	No

Mobile Number: Send SMS

Text Message: Exit

Sender Name: Set Standard Message

SMS Sent:

To see more details click on selected grid line

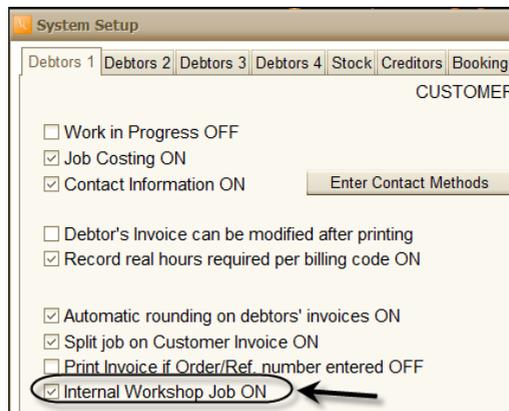
Internal Workshop Job Module (IWJ)

This module is a powerful tool for businesses having a requirement for the repair or rebuilding of assemblies that will be placed in stock ready for sale. It allows you to manage data related to:

- Processing jobs for stock
- Stock control (spare part components and finished product stages)
- Warranty traceability (parts and labour).

Activating the Internal Job Module

- On main menu screen select **SYSTEM** then **SYSTEM SETUP**.
- Select **Debtors 1** tab.
- Tick **Internal Workshop Job**.
- Click **Exit**.



The screenshot shows the 'System Setup' window with the 'Debtors 1' tab selected. The window title is 'System Setup'. The tabs are 'Debtors 1', 'Debtors 2', 'Debtors 3', 'Debtors 4', 'Stock', 'Creditors', and 'Booking'. The current customer is 'CUSTOMER'. The settings are as follows:

- Work in Progress OFF
- Job Costing ON
- Contact Information ON Enter Contact Methods
- Debtor's Invoice can be modified after printing
- Record real hours required per billing code ON
- Automatic rounding on debtors' invoices ON
- Split job on Customer Invoice ON
- Print Invoice if Order/Ref. number entered OFF
- Internal Workshop Job ON

Card File Set-up (initially only)

- Select **Customers Card File** from main menu screen.
- Click **New**, enter customers name as **INTERNAL JOB**.
- Tick the **INTERNAL WORKSHOP JOB** box.
- Click **EXIT**.

Customer Invoice | Quotation | Stock | Purchase Order | Supplier Invoice | Cust

CUSTOMER INVOICE

CONTACT INFORMATION

Last or business name: INTERNAL JOB [Edit]

Title: [] First name: []

Contact: [] Use contact name in reminder letters

Phone Work: [] Phone Home: []

Mobile: [] Send SMS No SMS

Fax: [] Internal workshop job

ABN: [] Price Type: RETAIL

Service Reminders: Print E-mail SMS

Creating Stock Codes for Internal Jobs

- Select **Stock & Billing Codes** from main menu screen.
- Click **New** and enter a part number for the product you rebuild and keep as an internal job.
- Change stock type to Internal Job.

Stock

Windows Calculator | Windows Calendar | Auto Care Modules

Customer Invoice | Quotation | Stock | Purchase Order | Supplier Invoice | Customers | Suppliers | Booking Diary

Code: BFX1234 [Edit] STOCK S [v]

Description: ALTERNATOR

Secondary description: []

Excluding GST

Average Cost	0.00
Retail price...	0.00
Trade price...	0.00

Automatic Markup

Select Stock Group...

- Stock
- Stock with Serial Number
- Billing Code
- Assembly
- Group Header
- Internal Job

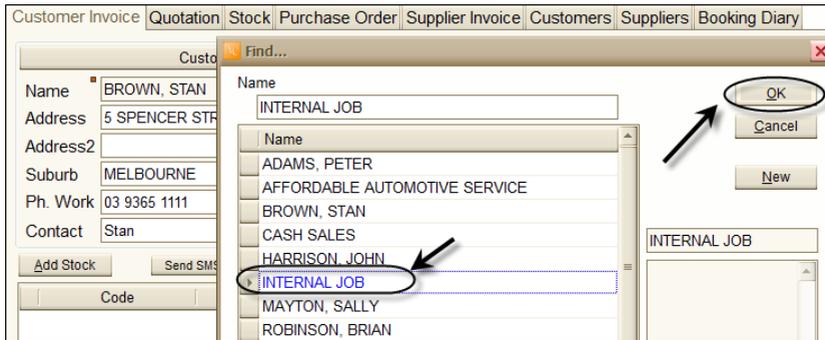
OK [] Cancel []

- Enter **Unit, Description** and select **Category**.
- Tick **Manual** or **Automatic Markup** depending on your own preferences.

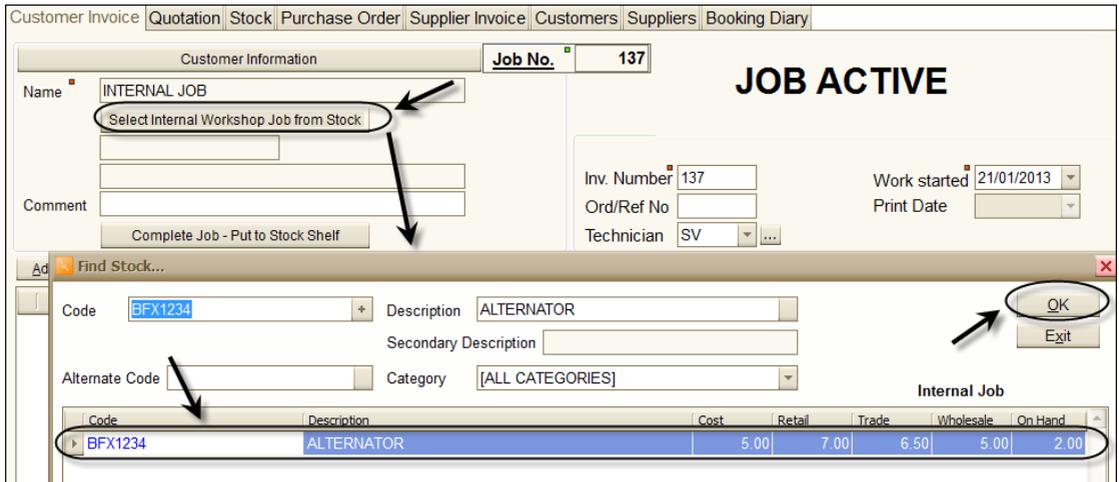
Using the Internal Job Module

You can create an internal job in the **Customer Invoice** module.

- Select **Customer Invoices** from main menu screen.
- Click **New**. Select **INTERNAL JOB** and click **OK**.



- Click on **SELECT INTERNAL WORKSHOP JOB**.
- A find window appears listing all stock codes checked as internal jobs.
- Select the code number you want to add to the internal job and click **OK**.



- Select the technician from the **Technician** combo box.
- Click **Add Stock** (directly above the code field) to enter your labour code and/or component parts required to carry out the job
- Once the internal job has been completed you need to transfer it from work in progress to stock on hand. Click on the **Complete Job – Put to Stock Shelf** button above the grid, click **YES** and then **OK**.

Customer Invoice | Quotation | Stock | Purchase Order | Supplier Invoice | Customers | Suppliers | Booking Diary

Customer Information Job No. 137

Name INTERNAL JOB

Select Internal Workshop Job from Stock

BFX1234

ALTERNATOR

Comment

Complete Job - Put to Stock Shelf

Inv. Number 137

Work started 21/0

Ord/Ref No

Print Date

Auto Care Software Premier

Do you want to close this job and put on the STOCK shelf?

Yes No

Work in progress

Code	Qty	Unit Cost	Unit	Total Cost
LAB	1.75	66.00		115.50
6001	1.00	8.25		8.25
654178	1.00	28.88	REGULATOR	28.88

- Note that the **Job Completed** sign appears on the invoice.

Customer Invoice | Quotation | Stock | Purchase Order | Supplier Invoice | Customers | Suppliers | Booking Diary

Customer Information Job No. 137

Name INTERNAL JOB

Select Internal Workshop Job from Stock

BFX1234

ALTERNATOR

Inv. Number 137

Invoice date 22/01/2013

JOB COMPLETED

Recall from stock

Warranty / Build ID Numbers

All stock items that have been raised through the internal job module are automatically assigned a build ID (warranty) number which is actually the internal job invoice number. **NOTE THAT THIS NUMBER SHOULD BE PERMANENTLY STAMPED ON THE PRODUCT.**

Both the build ID number & manufacture date are listed on the stock screen, including other relevant information.

Invoicing Internal Job Products

- Raise an invoice for the customer with usual method
- Click **Add Stock**. A find window appears.
- Select the stock code required and click **Add**.
- A selection window appears listing all internal jobs in stock. Tick **Show Cost** if you want to compare the costs against all products listed.
- Select the stock item you want to sell by its Build Invoice number and click **OK**.

Customer Invoice | Quotation | Stock | Purchase Order | Supplier Invoice | Customers | Suppliers | Booking Diary

Customer Information: Job No. 141

Name: SMITH, GREG
 Address: 55 JUNCTION ROAD
 Suburb: MANSFIELD PARK SA 5012
 Ph. Work: 08 8321 1256
 Contact: Price RETAIL CASH

Vehicle Information: Vehicle TOYOTA CAMRY, Registration 2STW321, Next service

Additional Invoice Information: Inv. Number 141, Invoice date 23/01/2013, Ord/Ref No, Print Date, Technician SV, \$ Incl. Gst No

Buttons: Add Stock, Send SMS, Receive SMS, See All SMS, Work completed

Code	Qty	Unit Price	Description	On Hand	Unit	Total Price
/						

Select Internal Job

Build Inv. No.	Build Date	Note / Comment	Cost Labour	Cost Part	Cost Total
138	22/01/2013		31.50	37.14	68.64
137	23/01/2013		31.50	66.01	97.51

Buttons: OK, Cancel, Show cost (checked)

Tracing on hand & sold items

- In the Stock module select the Internal job code
- Click on the **Show On Hand and Sold Stock** button just above the grid. Here you will see a list of both on hand and sold items with information including the build invoice number, build date, sale invoice number and sale date.

Stock

Code: BFX1234 | Edit | INTERNAL JOB | S

Description: ALTERNATOR | Unit: | Location: | Category: ALTERNATORS

Secondary description: | Excluding GST | Including GST

Internal Jobs

BFX1234 | ALTERNATOR | Exit

Build Inv. No.	Build Date	Cost Part	Cost Labour	Cost Total	Status	Sale Inv. No.	Sale Date	Note / Comment
138	22/01/2013	37.14	31.50	68.64	SOLD	141	23/01/2013	
137	23/01/2013	66.01	31.50	97.51	ON HAND			

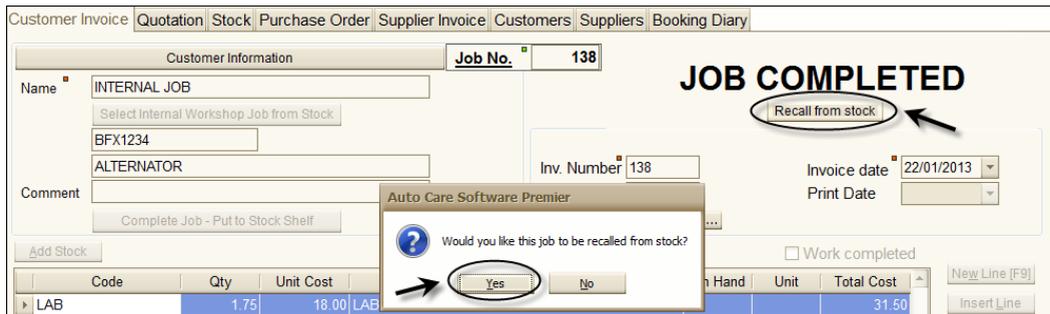
Return or re-work of an Internal Job Item

To return the item, do the following:

- Find the customer invoice for the item.
- Tick the invoice back to **Work in Progress**.
- Delete the quantity and press **Enter**.
- You will be asked if you want to delete this item put back to stock. Click **Yes**.

If re-work is needed follow the steps below:

- Find the internal job in the Customer invoice module.
- Re-open the internal job card by clicking on the **Recall from stock** button under the **JOB COMPLETED** sign.



- Carry out re-work as required. Add additional part and/or labour as requested. Close internal job when completed by clicking on the **Complete Job – Put to Stock Shelf** button above the grid
- Replace internal job item on customer invoice in normal way. Note that extra component parts and labour will be reflected in the adjusted cost total.

Cost Centres

In *Auto Care Software* there are three primary methods of implementing your sales and cost of sales ledger accounts.

- Default settings (single sales and cost of sales account)
- By Stock, Billing and Assembly (where you nominate a different sales and corresponding cost of sales account for each sales type)
- By computers (where you nominate a different sales and corresponding cost of sales account for individual computers)

IMPORTANT: We recommend that you consult your accountant when configuring your accounts.

To modify the default Sales and Cost of Sales account setting, do the following:

- Select **System** from the menu at the top of the screen.
- Select **System Setup**.
- Click on the **Ledger** tab.
- Make changes according to your business needs.

Configuring your cost of sales accounts

No special settings (Default configuration)

The default configuration of *Auto Care Software* offers a single sales and corresponding cost of sales accounts.

Commonly these are account numbers are:

Sales account	4-1100
Cost of Sales account	5-1100

System Setup

Debtors 1 Debtors 2 Debtors 3 Debtors 4 Stock Creditors Booking Ledger System 1 System 2 System 3 System 4

Block data entry on or before this date: 01/07/2010

SET UP COST CENTERS (Cost and Sales Account settings)

No special settings (Uses default General Ledger Settings at Linked Accounts)

By Stock items, Billing codes and Assemblies

Sales Account Cost Account

Stock item 4-1100 Sales 5-1100 Purchase (Cost Of Sale)

Billing code 4-8000 Miscellaneous Income Cost of Sales is Wages

Assembly 4-1200 Accessory Sales 5-1200 Other Purchase

Sales and Cost of Sales set by stock categories ON

By Computer (Separate Sales & Cost Accounts for each Computer)

Sales Account Cost Account

This Computer

Payroll Settings Exit

Setting ledger accounts by Stock, Billing Code and Assembly

If you select this option, you will be able to nominate an individual sales and cost of sales account for each sales type (Stock items, Billing Codes, Assembly).

- To select the accounts, click on the arrow on the right hand side of each field and select the appropriate account from the drop down menu. Note that you cannot set a cost of sales account for Billing Codes, as the cost of sales is wages.

SET UP COST CENTERS (Cost and Sales Account settings)

No special settings (Uses default General Ledger Settings at Linked Accounts)

By Stock items, Billing codes and Assemblies

Sales Account Cost Account

Stock item 4-1100 Sales 5-1100 Purchase (Cost Of Sale)

Billing code 4-1150 Billing Code (Sales) Cost of Sales is Wages

Assembly Chart of Accounts 5-1175 Assembly (Cost of Sales)

4-1100 Sales

4-1150 Billing Code (Sales)

4-1175 Assembly (Sales)

4-1200 Accessory Sales

4-1300 Sales discount

Change historical Sale and Cost accounts in CUSTOMER INVOICES & CREDIT ADJUSTMENT NOTES using account codes above

- To activate your new settings click on the **Set all Stock item, Billing Code and Assembly codes in Stock table using account codes selected above** button.

- To make these changes across the board for existing invoices and credit notes, click on the **Change historical Sales and Cost Accounts on customer invoices and credit adjustment notes using account codes above** button.

Sales and Cost of Sales Accounts by stock categories

If you want to select individual sales and cost of sales accounts for your stock categories, tick the **Sales and Cost of Sales set by stock categories** box. This allows each sales category to have a unique sales and cost of sales account. Note that to use this feature, you have to select the stock categories **ON** in the **System Setup/Stock** module.

To Set Sales and Cost of Sales accounts for stock categories follow the steps below:

- In the Stock module click on the button next to the **Category** field.

Stock

Windows Calculator Windows Calendar Auto Care Modules

Customer Invoice Quotation **Stock** Purchase Order Supplier Invoice Customers Suppliers Booking Diary

Code: 03-77753 Edit STOCK WITH SERIAL NO. [S] [v]

Description: ALTERNATOR Unit: EACH Location: []

Secondary description: [] Category: ALTERNATORS [v]

Sales Account 4-1100 Average Cost 0.00 Excluding GST Including GST

Cost Account 5-1100 Retail price... 0.00 0.00 Last sale 14/09/2012

Automatic Markup Trade price... 0.00 0.00 On Hand 1.00

Manual Markup Wholesale... 0.00 0.00 MinStock 0.00

MaxStock 0.00

- The **Stock Categories and markup %** window appears.
- Click **Edit** at the bottom of the screen.

Stock Categories and markup %

Category	Retail %	Trade %	Wholesale %	Sales Acc	Cost Acc
	30.00	50.00	70.00	4-1100	5-1100
"A" TYPE SERVICE KITS	0.00	0.00	0.00	4-1100	5-1100
"C" TYPE SERVICE KITS	0.00	0.00	0.00	4-1100	5-1100
"D" TYPE SERVICE KITS	0.00	0.00	0.00	4-1100	5-1100
AIR FILTERS	25.00	20.00	10.00	4-1100	5-1100
ALTERNATORS	40.00	30.00	0.00	4-1100	5-1100
BATTERIES	40.00	30.00	20.00	4-1100	5-1100
BRAKES	30.00	20.00	15.00	4-1100	5-1100
CLUTCH	40.00	30.00	20.00	4-1100	5-1100
EXHAUST	40.00	30.00	20.00	4-1100	5-1100
FILTER - AIR	100.00	0.00	0.00	4-1100	5-1100
FILTER - FUEL	50.00	0.00	0.00	4-1100	5-1100
FILTER - OIL	50.00	0.00	0.00	4-1100	5-1100
FUEL FILTERS (PLASTIC)	100.00	70.00	50.00	4-1100	5-1100
GENUINE PARTS	35.00	0.00	0.00	4-1100	5-1100
KITS	40.00	30.00	20.00	4-1100	5-1100

Set Default Default Category: [EMPTY CATEGORY]

Calculate automatic markups across the board Set Sales and Cost accounts across the board

New Delete **Edit** Cancel Save Exit Set Sales and Cost accounts to Invoices and Credit Notes

- Select the appropriate sales and cost of sales accounts from the drop down menu corresponding to each category.

Stock Categories and markup %

Category	Retail %	Trade %	Wholesale %	Sales Acc	Cost Acc
	30.00	50.00	70.00	4-1100	5-1100
"A" TYPE SERVICE KITS	0.00	0.00	0.00	4-1100	5-1100
"C" TYPE SERVICE KITS	0.00	0.00	0.00	4-1100	5-1100
"D" TYPE SERVICE KITS	0.00	0.00	0.00	4-1100	5-1100
AIR FILTERS	25.00	20.00	10.00	4-1150	Billing Code (Sales)
ALTERNATORS	40.00	30.00	0.00	4-1175	Assembly (Sales)
BATTERIES	40.00	30.00	20.00	4-1200	Accessory Sales

Account Code Account Name

4-1100 Sales

4-1150 Billing Code (Sales)

4-1175 Assembly (Sales)

4-1200 Accessory Sales

- After selecting your sales and cost of sales accounts click on the **Calculate automatic mark-ups across the board** button. This will update all sales and cost of sales account to corresponding categories and stock items.
- If you want to update all existing invoices and credit notes according to the new settings, click on the **Set Sales and Cost accounts to Invoices and Credit Notes** box.

The screenshot shows a dialog box with the following elements:

- A button labeled "Set Default" on the left.
- A text field labeled "Default Category:" containing "[EMPTY CATEGORY]".
- A button labeled "Calculate automatic markups across the board" with an arrow pointing to it from the right.
- A button labeled "Set Sales and Cost accounts across the board" with an arrow pointing to it from the left.
- A row of buttons: "New", "Delete", "Edit", "Cancel", "Save", and "Exit".
- A checkbox labeled "Set Sales and Cost accounts to Invoices and Credit Notes" which is currently unchecked.

Sales and Cost of Sales Accounts by Computers

By selecting this feature a unique sales and cost of sales account can be set for individual workstations. (A network version of *Auto Care Software* is required). Note that these settings must be configured at each individual workstation

- Select **By Computer (Separate Sales & cost of Sales Accounts for each computer)**
- From the drop down menus select the sales and cost of sales account for the computer.

The screenshot shows a dialog box with the following elements:

- A checked checkbox labeled "Sales and Cost of Sales set by stock categories ON".
- A radio button labeled "By Computer (Separate Sales & Cost Accounts for each Computer)" which is selected, with an arrow pointing to it from the left.
- A section labeled "This Computer" containing:
 - A "Sales Account" field with a dropdown arrow, circled with an arrow pointing to it from the right.
 - A "Cost Account" field with a dropdown arrow, circled with an arrow pointing to it from the right.
- A "Chart of Accounts" list showing "4-1100 Sales".
- Buttons for "Payroll Settings" and "Exit".

Job/Time Recording and Reports Module

The **Job/Time Recording and Reports Module** has been specifically designed to enable you to record and report the exact times your technicians have been working on a given job. If you have more than one technician working on a job, it records each individual time accordingly. But not only does it record time spent working on jobs, when it implemented, it is designed to clock your employees on, record the time they spend working on various jobs, as well as recording various breaks (i.e. morning tea, lunch, etc) and finally when they clock off for the day.

You can create and modify the **internal jobs** as required. Furthermore, you can have full control over error correction of times (e.g. an employee forgets to clock off for the day and it may create problems in recording his times).

Requirements and Set up

The **Job/Time Module** uses bar codes to record the technician's name against a job number. Therefore, initially you will need to ensure that the **Barcode Font** is installed on your computer. If you cannot find the Font on your computer, the Auto Care CD has a folder with the Barcode Font in it, ready to install if needed.

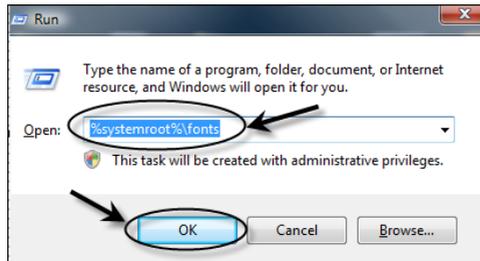
Installing Barcode Fonts

To ascertain whether your computer has the Barcode font installed, carry out the following:

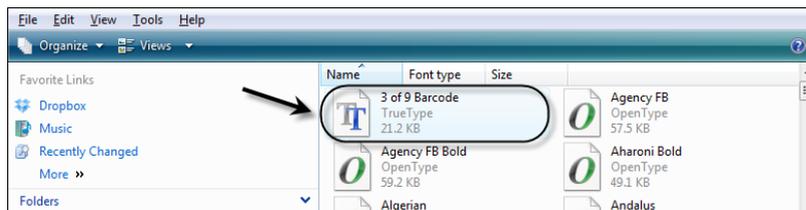
- Click on the **Start** button on your computer screen and select **Run**.



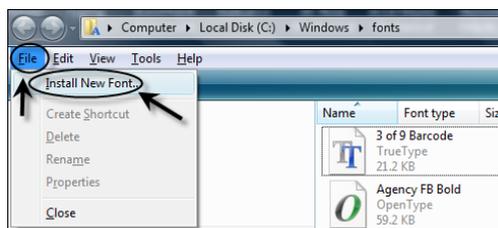
- Once the Run box has opened up, delete what ever is in the *Open* box and type the following exactly as it is written here: **%systemroot%\fonts**. Then click **OK**.



- The **Fonts** folder will open up. Have a look to see if the font **3 of 9 Barcode** is there or not. If it is, skip the next few steps.



- If you cannot find the font **3 of 9 Barcode** In the very top left hand corner, click on the **File** menu. Select **Install a New Font**.



- The **Add Font** window appears. All you need to do now is select your drive (in which you placed the Auto Care DVD), select the **barcodefont** folder and in the top box, select the font by clicking on it. Finally, click **OK**. A small screen will quickly pop up and the font will then be installed on your computer. It can be seen in the **Fonts** folder which is still open. Once you are satisfied that the Barcode font has been installed, close the **Fonts** folder.
- Due to the fact that the **Job/Time Module** uses bar codes to carry out the recording, you will also need a barcode reader. Your Auto Care agent can assist you with this, if you don't already have one.

- The next thing you need to do is to turn on the ability to print bar codes for your employees. To do this, start Auto Care and go into **System Setup** in the **System** menu. Once it has opened up, select the **Debtors 4** tab and you will see a tick box where you can turn ON or OFF the technician barcodes. Put a tick in it by clicking on it and then click **Exit**.

The screenshot shows the 'CUSTOMER CARDFILE SETTINGS' window. The 'Debtors 4' tab is selected. The following settings are visible:

- Monthly Statement sent to clients NO
- Customer Category ON
- Credit Stop ON
- Show Customer details on Customer find screen ON
- Find customers on customer's cardfile screen by name only
- Find customers by name, phone number or rego number
- Print/Use Technician Barcodes ON** (circled in red with an arrow)
- Caplink OFF

On the right side, there are sections for 'Show Internal Customer Number' (with radio buttons for 'Don't show', 'Show on customer's card file', and 'Show and insert to name') and 'Statement Settings' (with radio buttons for 'Print Statements with one overdue figure' and 'Statements with 30, 60 & 90 days+ figures'). A text box for 'Message on the Statement (Max 65 characters)' is also present.

- You can now go in and set up all your technicians with barcodes. To do this, go to the **Utility** menu and select **Servicemen Card File**. When it opens up, you will see two new features. One is the ability to add a **Barcode** to become the employee's barcode (this can be their initials, their employee number, or anything you like, as long as it is only 12 characters long (letters, numbers or both) and there are NO spaces in it). The other new feature is the ability to print out the barcodes.

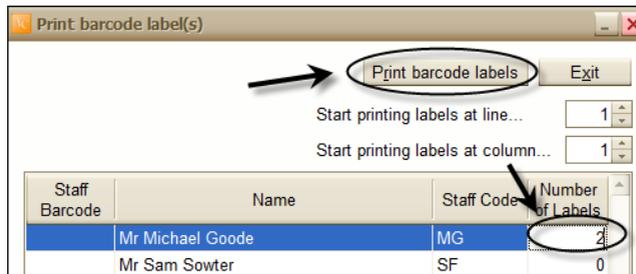
The screenshot shows the 'Servicemen Card file' window. The following fields and buttons are visible:

- Barcode**: A text input field circled in red with an arrow.
- Department**: A dropdown menu showing 'Workshop'.
- Title**: A text input field.
- First name**: A text input field.
- Surname**: A text input field.
- Jobtitle**: A text input field.
- Address**: A text area with a scroll bar.
- Telephone**: A text input field.
- Mobile**: A text input field.
- Cost / hour**: A text input field with '0.00' entered.
- Print Servicemen Barcodes**: A button circled in red with an arrow.
- Buttons at the bottom**: Set Default Serviceman, New, Prev, Next, Find, Delete, Cancel, Save, Exit.

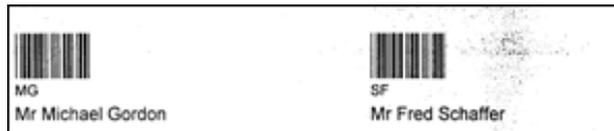
Entering Barcodes for Servicemen

Once you have entered the barcodes, click the **Print Servicemen Barcodes** button and you can then select the number of barcodes you want to print for each employee

and print them on the default printer. You can print them on 'sticky labels' and attach them where ever you like or, print them onto normal A4 paper, laminate it and place it next to the barcode scanner.



The printed barcodes will look like this:

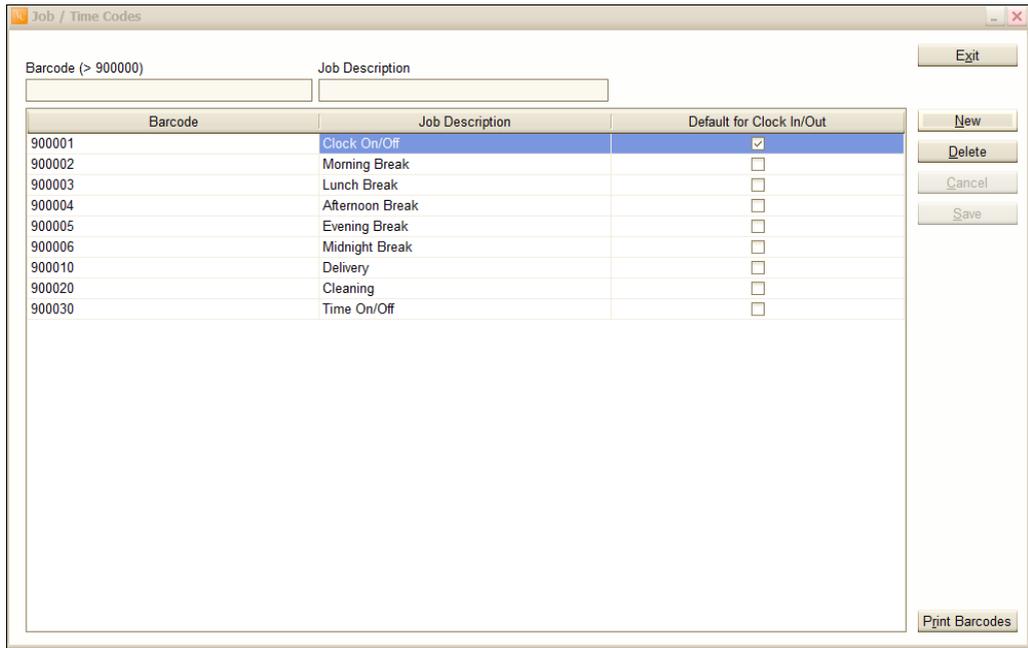


Managing Job/Time Barcodes

Once you have your employee barcodes set, you now need to have a look at the existing **Fixed Job** barcodes, add, modify and delete to suit your needs. To access this area, click on the **System** menu and at the bottom, you will see the **Job/Time Recording** module. Click on it and the **Job/Time** menu will be displayed.

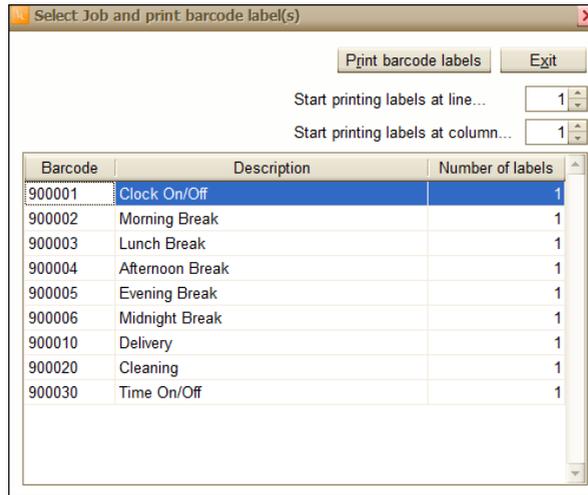


- Click on the **Job/Time Code Database** icon. Once selected, the following screen will appear. It contains all the **System Jobs** (E. G. Morning Brake, Delivery, Cleaning, etc) currently in the system.



From this screen, you can add, edit and /or delete the existing **System Jobs**. The third column **defaults for Clock In/Out** indicating that when an employee comes to work in the morning, they can clock straight onto their first job and the system will also clock them on for the day (or whichever is selected in the third column).

- When you are finished setting it all up, click on the **Print Barcodes** button. Select the barcodes and the number you want to print out. Then click **Print barcode labels**.
- You can print out these barcodes to either stickers or an A4 sheet and then laminate it.



And again, this is what the barcodes look like:



Now that you have set it all up, you have all your barcodes printed and your barcode scanner in place it is time to get to work and start recording the times.

General Operation and Reporting

Once you have set up the **Job/Time Module**, the use of it is quite easy. Basically, at the top right hand corner of every job card will be a barcode. This barcode is the actual job number written in a format so that it can be scanned.



The advantage of this system is that instead of trying to read the times either written on the job card by the technician or a time stamp from a card clocking machine, all the times are actually stored in a database where it can be read at a later stage, at your leisure.

The actual time recording module needs to be actively up on the screen of the computer upon which it is designated to run. You may have an old computer (from home or replaced out of the general computer population and is just sitting in the corner collecting dust) which may be ideal for this. All you need to do is run the Auto Care program and ensure that the bar code reader is installed and up and running (again, if you are not too sure about this, your Auto Care agent can assist you with it).

- To start recording times, click on the **Clock On/Off** icon on the main menu screen in the Job Time Recording and Reports module and the recording screen will open up.



- The recording screen is now waiting for you to scan the first employee's barcode. Once it is scanned, the name of the employee will appear and all they need to do now is to scan their job card to record their name and time against it. If they are starting a System Job, they can just scan the appropriate job from the preprinted list. On the screen you will see that an employee who has clocked on for the day as well as clocking onto their first job.

Job / Time

06/02/2013 15:21:29 New Login Exit

Staff barcode: 02 Job Number: 145

Mr John Brown

Job Number	Job	Start	Finish	Time in hours	Same time in minutes
900001	Clock On/Off	06/02/2013 15:22:00		0.00	0.00
145	Toyota Corolla 2WWW321	06/02/2013 15:22:00		0.00	0.00

The system now has started recording your employees' time and when they are issued another job, they can either clock off the existing job or just clock on to the new job. The **Job/ Time Module** will clock them off their existing job and clock them onto their new job.

The **New Login** button at the top is there to be used when the next employee is ready to log on. It is also used not only for the next employee but, when any employee wants to update their records. When clicked, it presents an empty log in screen and when the employee scans their name, it shows their current times.

Eventually, by the end of the day, they will have clocked on and off a number of charge-able jobs as well as system jobs. The following figure shows a basic example of a day's work (this is only an example and has only two jobs logged on it). It shows that the start and finish date for the jobs as well as the time spent on them.

Job / Time

06/02/2013 16:17:51 New Login Exit

Staff barcode: 02 Job Number: 900001

Mr John Brown

Job Number	Job	Start	Finish	Time in hours	Same time in minutes
900001	Clock On/Off	06/02/2013 15:22:00	06/02/2013 16:18:23	0.94	56.39
145	Toyota Corolla 2WWW321	06/02/2013 15:22:00	06/02/2013 15:32:40	0.18	10.67
900004	Afternoon Break	06/02/2013 15:32:40	06/02/2013 15:44:36	0.20	11.93
146	Toyota Camry VOW 787	06/02/2013 15:44:36	06/02/2013 16:18:23	0.56	33.79

Rectifying Entry Errors

If there is an error of some sort in the actual time recorded, the manager/supervisor can make amendments in the **Job/Time Module**.

- Click on the **Clock On/Off Error Correction**.



- The log in screen appears (exactly the same as the normal Clock On / Clock off screen),
- To carry out an error correction, all you need to do is to scan the barcode of the employee, whose times require adjusting, then select the offending entry and adjust it accordingly. Use the **Tab** key to move from one column to the next in the line. To make changes to a date, click on the date and overtype it. To move the cursor within the field use the **Enter** key.

Job/Time Reports

The reports from the time recording system can be accessed from the same menu.



Job / Time Report by Technicians

Once selected, this report allows you to generate a report based on a daily period (from midnight to midnight). Obviously, you can change the selection criteria to suit your needs and report on the times you require.

The screenshot shows a dialog box titled 'Job / Time Report' with a close button (X) in the top right corner. It contains two text input fields: 'Start date' with the value '06/02/2013 00:00:00' and 'Ending date' with the value '06/02/2013 23:59:59'. To the right of each field are 'OK' and 'Cancel' buttons respectively.

The report displays all the technicians' activity details for the selected period.

Wednesday, 6 February 2013 4:29 PM

Job / Time Report by Technician

From 06/02/2013 00:00:00 to 06/02/2013 23:59:59

Name	Clock ON Start	Clock ON Stop	Job #	Job Description	Time (hours)
<u>(JB) Mr John Brown</u>	06/02/2013 3:22 PM	06/02/2013 4:18 PM		Staff barcode: 02	
			145	Toyota Corolla 2WWW321	0.18
				Afternoon Break	0.20
			146	Toyota Camry VOW 787	0.56
Total Clocked On time (hours)		0.94		Productive time	0.74
Final Total		0.94			0.74

Total clocked on time (hours) - these are the hours we pay to technicians. If technician is not clocked ON at all or still clocked ON this figure doesn't show all the hours we are liable to pay.

Productive time - these are those hours that the technicians have been working on jobs.

As can be seen from this report, it shows when the technician clocked on and off for the day as well as showing all the jobs he worked on and the time spent on each, culminating in their productive time in hours and as a percentage of their total time clocked on for the day.

Job / Time Report by Jobs

This report shows the jobs worked from the date entered to the date entered.

Job / Time Report by dates

Start date: 06/02/2013

Ending date: 06/02/2013

Buttons: OK, Cancel

Sunshine Auto Repairs
Thursday, 7 February 2013 10:01 AM

Page: 1/1

Job / Time Report by Jobs

From 06/02/2013 to 07/02/2013

Job #	Description	Hours Charged	Hours Worked	Charged vs Worked
145	Toyota Corolla 2WWW321	0.20	0.18	111.11%
146	Toyota Camry VOW 787	2.00	0.56	357.14%
Total		2.20	0.74	297.30%

The information presented this time, as indicated above, shows the hours allocated (assigned when the billing code is set up) and the real hours worked (hours charged – recorded by the use of the barcodes and the reader, etc), and finally the effective percentages. This report uses the assigned times allocated to billing codes. For correct information to be presented and for it to be accountable, whenever any labour related work is carried out, it must be recorded against a labour related billing code as this gives a better indication of productivity.

Job / Time Report by Job Number

This report shows all the technicians who worked on a specific job number.

- Select the job number you wish to report on. Once you enter the job number, the input screen will pick up the customers details before you click OK, allowing you to make sure that you have the correct job number.

Job / Time Report by JobNumber

Job Number:

Buttons: OK, Cancel

Sunshine Auto Repairs		Page: 1/1	
Wednesday, 6 February 2013 4:51 PM			
Jobtime Report by Job Number			
Job Number 145			
WHITEHEAD, SUE TOYOTA COROLLA 2WWW321			
Technician	Start	Finish	Hours Cost/Hour Total Labour
Mr John Brown	06/02/2013 15:22 PM	06/02/2013 15:32 PM	0.1778 27.50 4.89
Total			0.1778 4.89

The report generated shows you all the technicians who worked on a particular job (assuming that they clocked on to it). It breaks down the start and finish times, the hours worked, the cost per hour for the technician (set when you set your technicians up) and finally, the total money generated for the job created from labour alone.

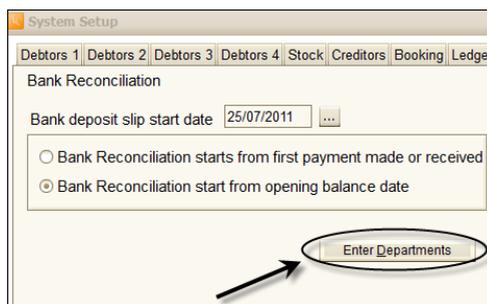
One final thing to note: if your barcode reader fails in some way, you can still manually enter the employee barcode and job number details by typing them into the appropriate fields.

Productivity report by Employee and/or Department

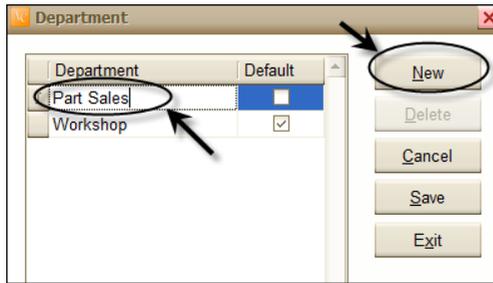
Setting up Departments

If you want to create productivity reports by departments, you have to enter the name of your departments in the System Setup.

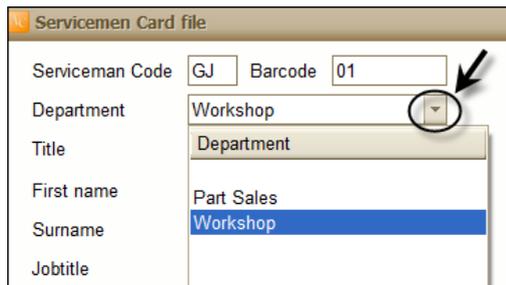
- To enter departments, go to **System Setup** and select **Sytem3** page and click on the **Enter Departments** button.



- The **Enter Departments** on Departments screen appears. Click New to enter a department, and enter its name. Note that a department can be deleted only if it is not selected for a technician.



- To select a department for a technician, go to go to the UTILITY and select the **Servicemen Card File** module.
- Click on the down arrow next to the **Department** Field and select the appropriate department.



Creating Productivity report

- Click on the **Productivity Report by Employee and/or Department** on the **Job/Time Menu**



- As a default the **Report for a selected employee** button is ticked. Simply enter the start and ending date, select the employee form the **Employee** down-drop menu and click **OK**.

Productivity report by Employee and/or Department

Start date: 06/02/2013

Ending date: 07/02/2013

Report by selected employee
 Report by selected department

Employee: JB

Staff Code	First Name	Last Name
GJ	Garry	Jones
JB	John	Brown
MG	Michael	Goode
RP	Roger	Pine
SF	Sam	Sowter
SV	Sid	Victor
TM	Tim	Wilson

Sunshine Auto Repairs
Thursday, 7 February 2013 11:48 AM

Page: 1/1

Productivity Report

From 06-02-2013 to 07-02-2013

JB John Brown

Job number	Job Description	Hours worked	Hours charged	% Productivity	
145	Toyota Corolla 2WWW321	0.18	0.00	0.00%	No Job Card <input type="checkbox"/>
146	Toyota Camry VOW 787	0.56	0.00	0.00%	No Job Card <input type="checkbox"/>
Total		0.74	0.00	0.00%	

The report shows the Employee name, the productivity report start and ending dates, Job number, Job description, Hours Worked, Hours Charged and % Productivity. Total hours and total productivity % are also printed.

- To create a report by departments, tick the **Report by department** radio button. Enter the start and ending date, select the department form the **Department** down-drop menu and click **OK**.

Productivity Report

From 06-02-2013 to 07-02-2013

Part Sales

Job number	Job Description	Hours worked	Hours charged	% Productivity	
145	Toyota Corolla 2WWW321	0.18	0.00	0.00%	No Job Card <input type="checkbox"/>
146	Toyota Camry VOW 787	0.56	0.00	0.00%	No Job Card <input type="checkbox"/>
148	Toyota Camry 2STW321	0.00	0.00	0.00%	Logged on <input type="checkbox"/>
147		0.00	1.00	0.00%	<input type="checkbox"/>
148		0.00	1.00	0.00%	<input type="checkbox"/>
Total		0.74	2.00	270.27%	

The report shows the Department, the productivity report start and ending dates, the Job number, Job description, Hours Worked, Hours Charged and % Productivity. Total hours and total productivity % are also printed.