

# Quick Reference Manual



# Computer Information System

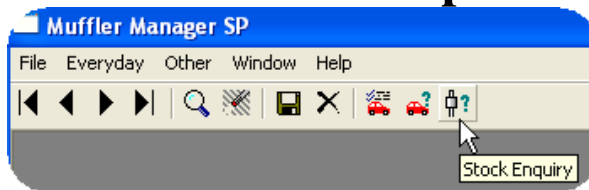
Version 2

# INDEX

**From Main Menu: (Everyday)**

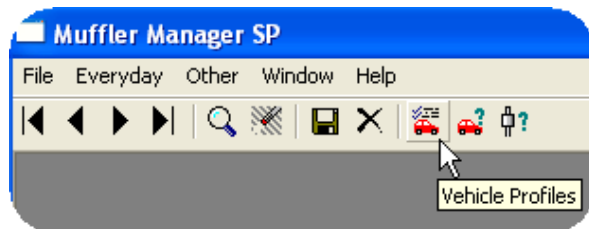
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## Parts Look Up



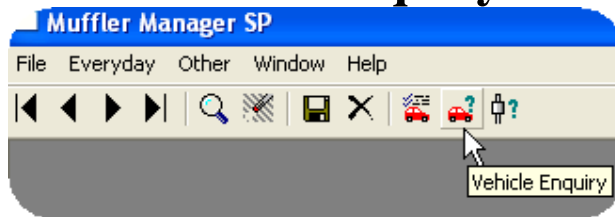
**TYPE IN # USE (F9) TO LOAD AND (F7, F8) TO SCROLL FORWARD OR BACKWARD**

## Vehicle Profile



**CLICK ON CATALOG, MODEL, YEAR AND ADD. SELECT ITEMS, IF YOU'RE ON AN INVOICE CLICK OK**

## Vehicle Enquiry



**TYPE IN REGO (F9) THIS WILL GIVE YOU ALL DETAIL**

---

**(TAB)** KEY WILL TAKE YOU THROUGH THE DOCUMENT  
**(SHIFT + TAB)** WILL TAKE YOU BACK

IN STOCK MAINTENANCE: AFTER TYPING IN THE PART # HIT THE **(F9)** KEY THIS WILL LOAD THE PART # FOR YOU TO VIEW DISCRPTION, PRICING EX...

**(F7)** AND **(F8)** WILL ALLOW YOU TO SEARCH UP OR DOWN FOR THE PART # YOU WANT

**(F5)** WILL CLEAR CURRENT OR ADD A NEW RECORD

**(F2)** WILL SAVE

**(SHIFT + F2)** WILL DELETE THE CURRENT WORK

## Raise a Quote:

“Remember to Quote + GST on Quotes”

Quote Entry

New Quote Load Vehicle Profile Cancel Quote

Quote (on hold) Name

Account ID

Margin

Finalise

Parts Total	0.00
Labour	0.00
Discount	0.00
Gst	0.00
TOTAL	0.00

General Customer/Vehicle Parts Packages Labour/Discount Comments

Price:

Inclusive

Gst Type:

\$0.00

Sundries:

Cust Ref:

Click on **Everyday**

Click on **customer Quote**

Click on **New Quote** or customer on hold or account cust. If you know it's on hold.

## Raise a Quote: (cont'd)

### Customer/Vehicle:

General			Customer/Vehicle			Parts			Packages			Labour/Discount			Comments		
0 ...						FUN 321 ...			KDKFD393040EKDL ...								
Code			Registration			Vin Number											
DOWNING ...			STEVE			A			MERCEDES			350SL					
Surname			Given Names			Title			Make			Model					
9999 BECKETT RD ...									1974			SEDAN					
Address / Suburb			Post Code			Year			Style								
BRIDGEMAN DOWNS ...			4035 ...			12 5			09D0DFKE9ED.K0KLK								
Business Phone			After Hours			Mobile			Rego Day/Month			Engine Number					
1244524						978-02-4911						SILVER			Odometer:		
Business Phone			After Hours			Mobile			Rego Day/Month			Engine Number			Odometer:		
steved@clockworkcomputing.com																	
Email																	
<input checked="" type="checkbox"/> Direct Mail																	

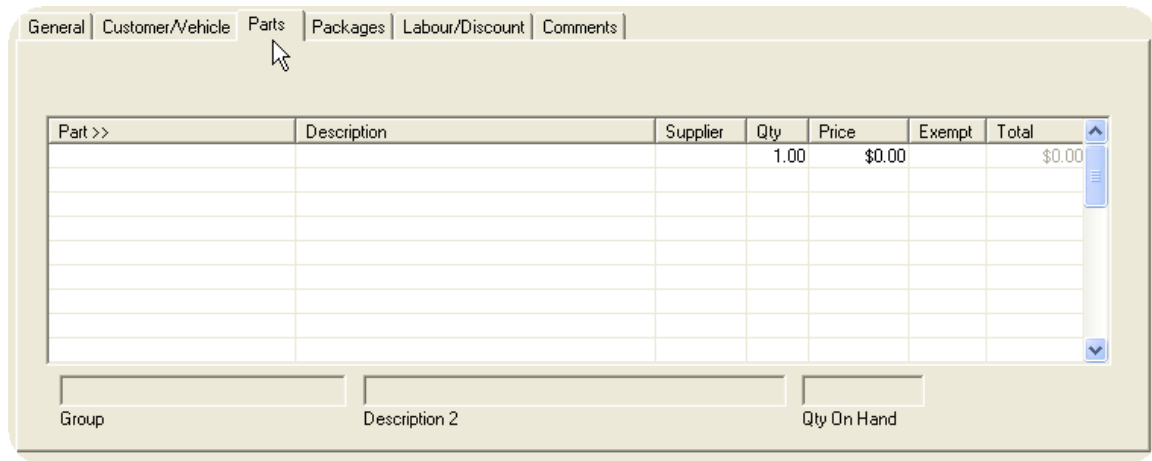
### Customer/Vehicle:

Click on **customer/vehicle**

Click on **surname**, enter customer's details after entering suburb click on drop down to retrieve post code, tab through to vehicle details.

## Raise a Quote: (cont'd)

### Parts:



The screenshot shows a software window with a tabbed interface. The 'Parts' tab is selected. The window contains a table with the following columns: Part >>, Description, Supplier, Qty, Price, Exempt, and Total. The first row of the table has the following values: Part >>, Description, Supplier, 1.00, \$0.00, Exempt, and Total \$0.00. Below the table, there are three input fields labeled 'Group', 'Description 2', and 'Qty On Hand'.

Part >>	Description	Supplier	Qty	Price	Exempt	Total
			1.00	\$0.00		\$0.00

Group Description 2 Qty On Hand

### Parts:

Click on **parts** – type in parts if you know the part number

**“USE THE SHIFT F2 TO DELETE LINE IF WRONG PART # USED”**

Click on **vehicle profile** if needed to retrieve part number, after clicking on vehicle.

Click on **model**, type in model example falcon, commodore, and magna  
Click **OK**

Click on **year** and scroll for right year

Click on **catalog type**, type in - example (brakes)

Click **add**

Click which brake parts you need – If other parts needed like exhaust, go back to **catalog type** and click standard exhaust then click add again.

When finished **click ok.**

# Packages

## How to use Packages:

If you want to input a Package, example \$79 oil change or \$99 brake reline, click on Packages.

**Invoice Entry**

New Invoice Load Quote Load Vehicle Profile Cancel Invoice

Invh Id: Name  
Cusm Id:  Calcdeflabour

Margin  
Payment  
Finalise

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

General Customer/Vehicle Parts **Packages** Labour/Discount Comments

Type >>	Description	Package ID	Labour	Total	Package price
		0	\$0.00	\$0.00	\$0.00

Part >>	Description	Qty	Price	Total
		1.00	\$0.00	\$0.00

Description 2 Qty On Hand Load Vehicle Profile

Click on Package

Click on type >>

Arrow up or down to pick package

Click on package

Click ok

Click on part >> or Load Vehicle Profile bottom right "only"

Add parts that are need

Click ok

Continue on with Labour / Discount

## Raise a Quote: (cont'd)

### Labour/Discount:

Jobtype >>	Name	Mech. >>	Name	Hrs	Min	Labour	Discount	Parts total
EXHT	Exhaust Systems	1	STEVE DOWNING	0	30	23.00	0.00	151.80

Discount

### Labour/Discount:

Click on **Labour/Discount**

Click on **mechanic** then choose, click **ok**

Click on **hours** input hours

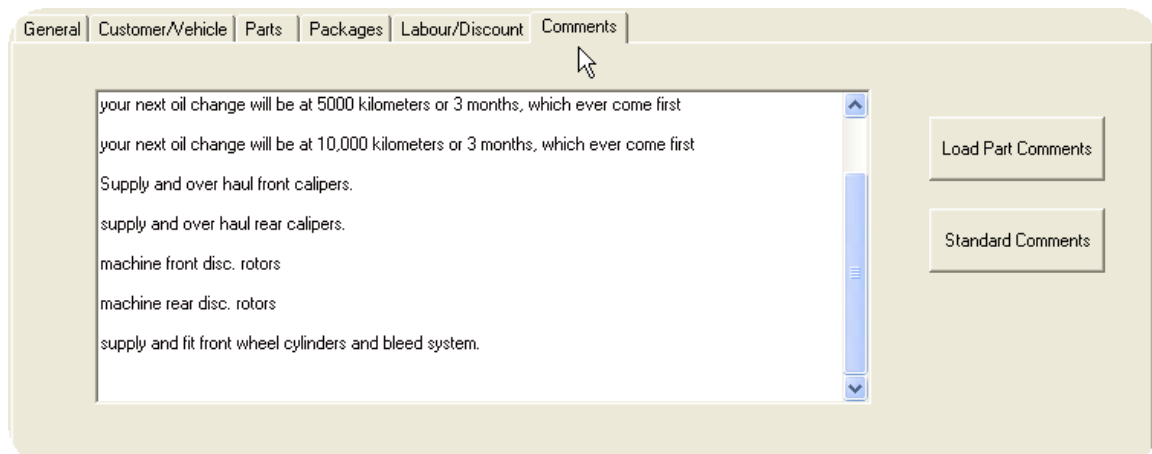
Click on **minutes** inputs min.

Click on **labour** if you wish to change labour rate.

Click on **Margin** to confirm correct **Margin**, if margin is not enough, then click on **labour** and change the amount.

## Raise a Quote: (cont'd)

### Comments:



### Comments:

Click on **comments**

Click on **standard comments** (scroll to comment you want)

Click on comment you want

Click ok

Click on finalise quote:

Exit back to main screen of Muffmansp

## Raise an Invoice from a Quote:

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

Click on **everyday**

Click on **new invoice**

Click on **load quote**

Click on **Qtem Id** and scroll to customer

Click on **customer**

Click on **load quote**

Click **code** and click on and off which job type you want.

Click **ok**

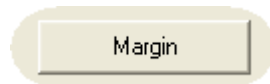
## Before finishing invoice:

Click on **general, parts, labour/discount, customer /vehicle** and make sure details are ok, **Re-enter comments.**

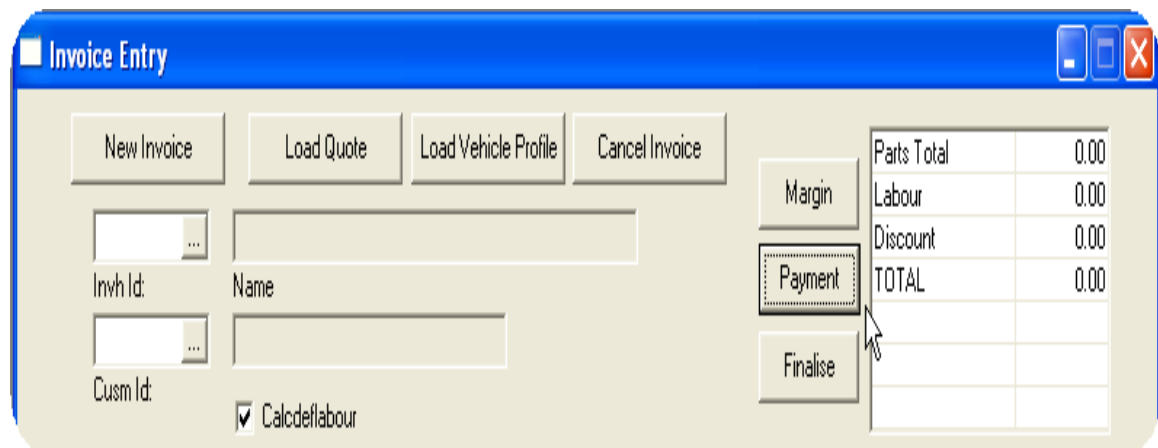
## Raising an Invoice from a Quote: (cont'd)

### Margin:

Click on **Margin** again to make sure that **margin** is correct, if margin is not enough, then click on **labour** and change the amount.



### Payment details:

A screenshot of a software window titled "Invoice Entry". The window has a blue title bar and standard window controls. It contains several buttons: "New Invoice", "Load Quote", "Load Vehicle Profile", and "Cancel Invoice" at the top. Below these are input fields for "Invh Id:" and "Cusm Id:", each with a dropdown arrow. A "Name" field is also present. A "Calcdeflabour" checkbox is checked. On the right side, there are three buttons: "Margin", "Payment" (highlighted with a dashed border), and "Finalise". To the right of these buttons is a table with the following data:

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

### Click on payment details:

Click on **new**

Click on **arrow icon** and arrow down and choose the payment desired

Click on **ok**

Click on **close**

Click on **Finalize payment**

Click **yes** to comment

Click **ok** to print

Exit back to main Muffman screen

**Raise an invoice “without a quote”:**  
**or**  
**Raise an Account Customer Invoice**

**Invoice Entry**

New Invoice   New Cash Sale   Load Quote   Load Vehicle Profile   Cancel Invoice

Invoice (on hold)   Name

Account ID    Calculate Labour

Margin

Payment

Finalise

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

General   Customer/Vehicle   Parts   Packages   Labour/Discount   Comments

Price 1   Price:   Inspection

Inclusive   Where did you hear?

\$0.00   Follow Up Date

Sundries:   26/11/2004   14:40

Cust Ref:   Received Date:   Received Time:

Click on **Everyday**

Click on **customer invoice**

Click on **New invoice** or “**New Cash Sale**” if you want a **cash sale only**

Click on customer on **hold** or **account ID**. If you know it's on hold otherwise

## Raise an invoice “without a quote”: (cont’d)

### Customer/Vehicle:

General	Customer/Vehicle	Parts	Packages	Labour/Discount	Comments
Code 1005506 ...		Registration FUN 321 ...		Vin Number KDKFD393040EKDL ...	
Surname DOWNING ...		Given Names STEVE		Title MR	
Address / Suburb 999 BECKETT RD					
BRIDGEMAN DOWNS ...		Post Code 4035 ...			
Business Phone		After Hours		Mobile 0412621619	
Email steved@clockworkcomputing.com.au					
<input checked="" type="checkbox"/> Direct Mail					
Make MERCEDES		Model 350SL			
Year 1974		Style SEDAN			
Rego Day/Month 12 5		Engine Number 09D0DFKE9ED,K0KLLK			
Colour SILVER		Odometer:			

### Customer/Vehicle:

Click on **customer/vehicle**

Click on **surname**, enter customer’s details after entering suburb click on drop down to retrieve post code, tab through to vehicle details and enter details.

## Raise an invoice “without a quote”: (cont’d)

### Parts:

Part >>	Description	Supplier	Qty	Price	Exempt	Total
M386E	CENTRE MUFFLER ASSEMBLY		3	1.00	\$151.80	\$151.80

TOP 50 MUFFLERS (M)      FORD FALCON      0.00  
Group      Description 2      Qty On Hand

### Parts:

Click on **parts** – type in parts if you know the part number

**“USE THE SHIFT F2 TO DELETE LINE IF WRONG PART # USED”**

Click on **vehicle profile** if needed to retrieve part number, after clicking on vehicle.

Click on **model**, type in model example falcon, commodore, and magna

Click **OK**

Click on **year** and scroll for right year

Click on **catalog type**, type in - example (brakes)

Click **add**

Click which brake parts you need – If other parts needed like exhaust, go back to **catalog type** and click standard exhaust then click add again.

When finished **click ok.**

# Packages

## How to use Packages:

If you want to input a Package, example \$79 oil change or \$99 brake reline, click on Packages.

**Invoice Entry**

New Invoice Load Quote Load Vehicle Profile Cancel Invoice

Invh Id: Name  
Custm Id:  Calcdelabour

Margin  
Payment  
Finalise

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

General Customer/Vehicle Parts **Packages** Labour/Discount Comments

Type >>	Description	Package ID	Labour	Total	Package price
		0	\$0.00	\$0.00	\$0.00

Part >>	Description	Qty	Price	Total
		1.00	\$0.00	\$0.00

Description 2 Qty On Hand Load Vehicle Profile

Click on Package

Click on type >>

Arrow up or down to pick package

Click on package

Click ok

Click on part >> or Load Vehicle Profile bottom right "only"

Add parts that are need

Click ok

Continue on with Labour / Discount

## Raise an invoice “without a quote”: (cont’d)

### Labour/Discount:

Jobtype >>	Name	Mech. >>	Name	Hrs	Min	Labour	Discount	Parts total
EXHT	Exhaust Systems	1	STEVE DOWNING	0	30	23.00	0.00	151.80

Discount

### Labour/Discount:

Click on **Labour/Discount**

Click on **mechanic** then choose, click **ok**

Click on **hours** input hours

Click on **minutes** inputs min.

Click on **labour** if you wish to change labour rate.

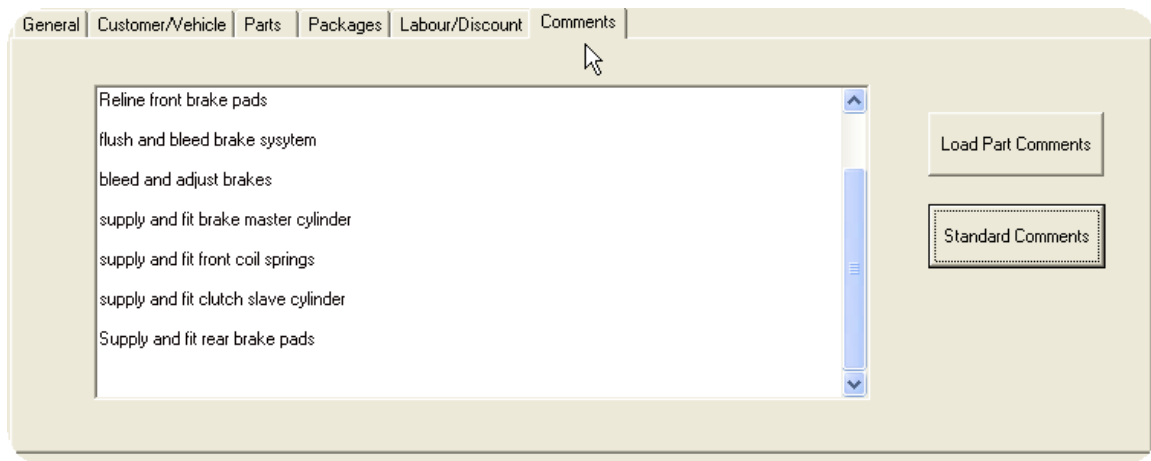
### Margin:

Margin

Click on **Margin** to confirm correct **Margin**, if margin is not enough, then click on **labour** and change the amount.

## Raise an invoice “without a quote”: (cont’d)

### Comments:



### Comments:

Click on **comments**

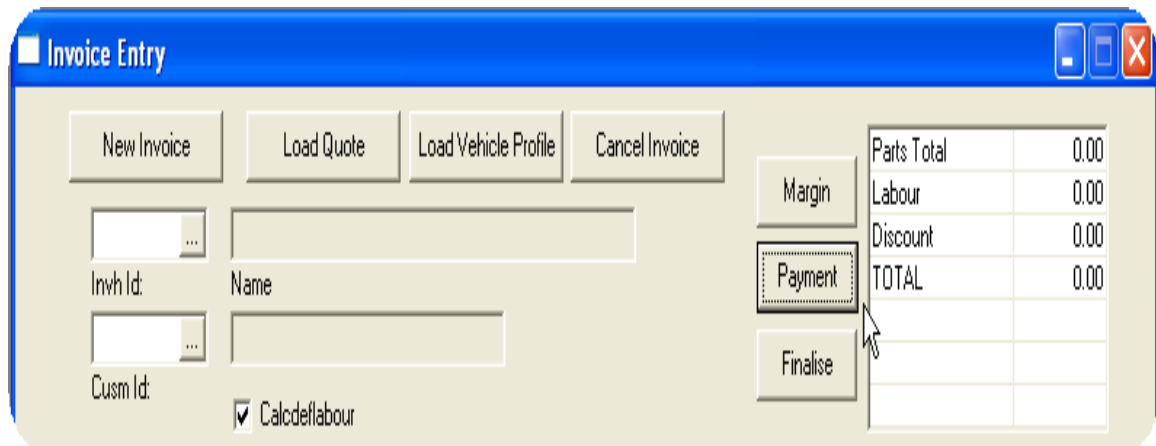
Click on **standard comments** (scroll to comment you want)

Click on comment you want

Click ok

## Raise an invoice “without a quote”: (cont’d)

### Payment details:



The screenshot shows the 'Invoice Entry' window with the following elements:

- Buttons: New Invoice, Load Quote, Load Vehicle Profile, Cancel Invoice
- Fields: Invh Id: (with dropdown arrow), Name, Cusm Id: (with dropdown arrow)
- Checkbox:  Calcdeflabour
- Dropdown menu: Margin, Payment (highlighted), Finalise
- Table:

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

### Click on payment details:

Click on **new**

Click on **arrow icon** and arrow down and choose the payment desired

Click on **ok**

Click on **close**

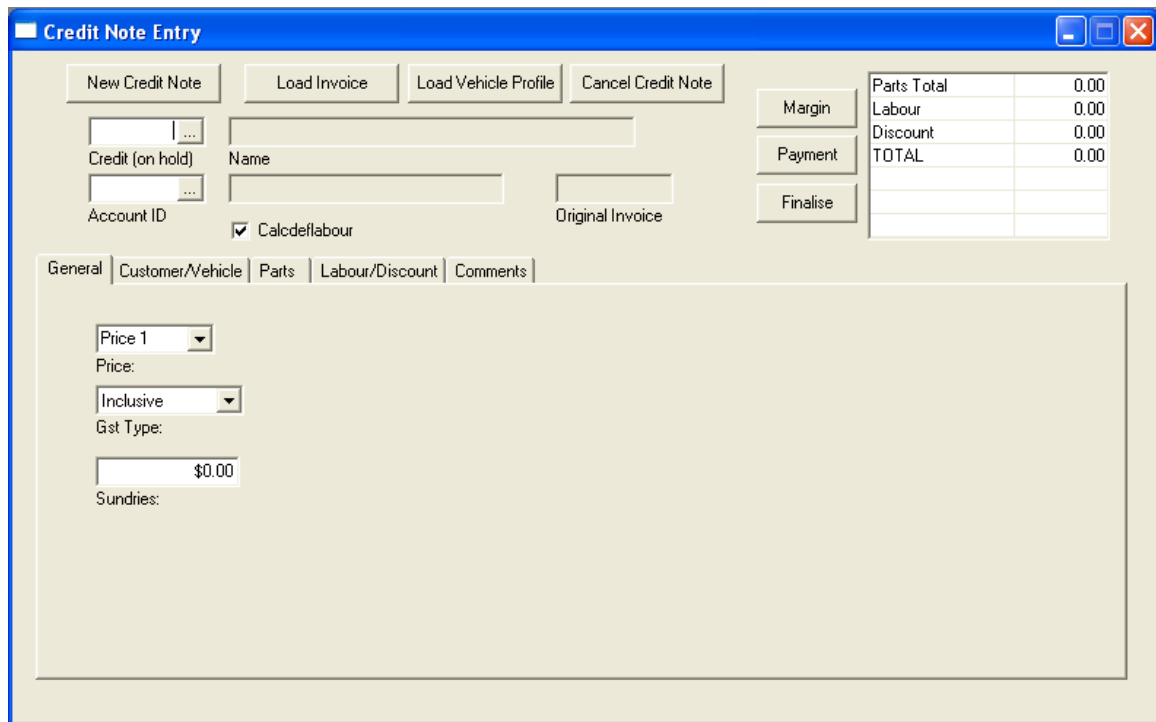
Click on **Finalize payment**

Click **yes** to comment

Click **ok** to print

Exit back to main Muffman screen

## Raise a Customer credit note:



Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

### Customer Credit Note:

Click on **Everyday**

Click on **customer credit**

Click on **mm Ref #** if you know it's on hold.

Click on **new credit note**

Click on **Account Id** if you want an account customer

Click on **Load invoice** if you know the #

## Raise a Customer credit note: (cont'd)

### Customer/Vehicle:

The screenshot shows a software interface with a tabbed menu at the top containing 'General', 'Parts', 'Labour/Discount', 'Customer/Vehicle', and 'Comments'. The 'Customer/Vehicle' tab is active. The form is divided into two columns. The left column contains fields for 'Code', 'Surname', 'Given Names', 'Title', 'Address / Suburb', 'Post Code', 'Business Phone', 'After Hours', 'Mobile', 'Email', and a 'Direct Mail' checkbox. The right column contains fields for 'Registration', 'Vin Number', 'Make', 'Model', 'Year', 'Style', 'Rego Day/Month', 'Engine Number', and 'Colour'. Each field is represented by a text box, some with a dropdown arrow icon.

### Customer/Vehicle:

Click on **customer/vehicle**

Click on **surname**, enter customer's details and vehicle details by using the tab key.

## Raise a Customer credit note: (cont'd)

### Parts:

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

### Parts:

Click on **parts** – type in parts if you know the part number

Click on **vehicle profile** if needed to retrieve part number, after clicking on vehicle.

Click on **model**, type in model example falcon, commodore, and magna

Click **OK**

Click on **year** and scroll for right year

Click on **catalog type**, type in – example (brakes)

Click **add**

Click which brake parts you need – If other parts needed like exhaust, go back to **catalog type** and click standard exhaust then click add again.

When finished **click ok**.

**“USE THE SHIFT F2 TO DELETE LINE IF WRONG PART # USED”**

## Credit note Packages

### How to use Packages:

If you want to input a Package, example \$79 oil change or \$99 brake reline, click on Packages.

The screenshot shows the 'Credit Note Entry' window. At the top, there are buttons for 'New Credit Note', 'Load Invoice', 'Load Vehicle Profile', and 'Cancel Credit Note'. Below these are input fields for 'Credit (on hold)', 'Name', 'Account ID', and 'Original Invoice'. A 'Calcdeflabour' checkbox is checked. On the right, there are buttons for 'Margin', 'Payment', and 'Finalise', and a summary table:

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

Below the input fields are tabs for 'General', 'Customer/Vehicle', 'Parts', 'Labour/Discount', and 'Comments'. The 'General' tab is active, showing a 'Price 1' dropdown, a 'Price:' label, an 'Inclusive' dropdown, a 'Gst Type:' label, a text box containing '\$0.00', and a 'Sundries:' label.

Click on Package

Click on type >>

Arrow up or down to pick package

Click on package

Click ok

Click on part >> or Load Vehicle Profile bottom right "only"

Add parts that are need

Click ok

Continue on with Labour / Discount

## Raise a Customer credit note: (cont'd)

### Labour/Discount:

The screenshot shows the 'Credit Note Entry' window with the 'Labour/Discount' tab selected. The window contains several buttons at the top: 'New Credit Note', 'Load Invoice', 'Load Vehicle Profile', and 'Cancel Credit Note'. Below these are input fields for 'Credit (on hold)', 'Name', 'Account ID', and 'Original Invoice'. A checkbox labeled 'Calcdelabour' is checked. On the right side, there are buttons for 'Margin', 'Payment', and 'Finalise'. A summary table is visible on the right:

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

The main area of the window has a tabbed interface with 'General', 'Customer/Vehicle', 'Parts', 'Labour/Discount', and 'Comments'. The 'Labour/Discount' tab is active, showing a 'Price 1' dropdown, a 'Price:' label, an 'Inclusive' dropdown, a 'Gst Type:' label, and a text box containing '\$0.00'. Below this is a 'Sundries:' label.

### Labour/Discount:

Click on **Labour/Discount**

Click on **mechanic** then choose, click **ok**

Click on **hours** input hours

Click on **minutes** inputs min.

Click on **labour** if you wish to change labour rate.

## Raise a Customer credit note: (cont'd)

### Comments:

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

### Comments:

Click on **comments**

Click on **standard comments** (scroll to comment you want)

Click on comment you want or add your own

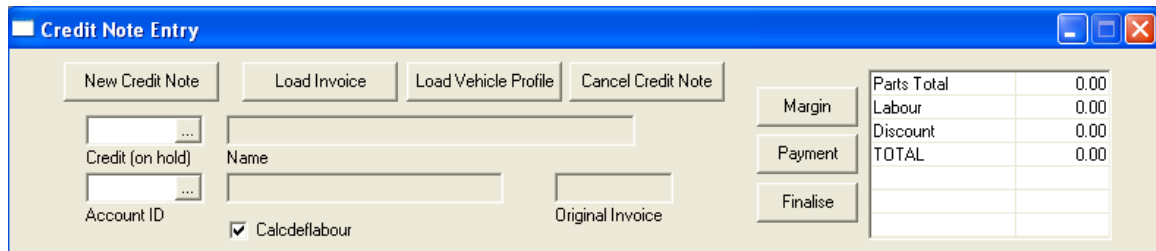
Click ok

**Finishing Customer Credit note:**

Click on **general, parts, labour/discount, customer/vehicle and comments** to make sure details are ok.

## Raise a Customer credit note: (cont'd)

### Payment details:



The screenshot shows a software window titled "Credit Note Entry". At the top, there are four buttons: "New Credit Note", "Load Invoice", "Load Vehicle Profile", and "Cancel Credit Note". Below these are several input fields: "Credit (on hold)", "Name", "Account ID", and "Original Invoice". There is also a checkbox labeled "Calcdellabour" which is checked. On the right side, there are three buttons: "Margin", "Payment", and "Finalise". To the right of these buttons is a table with the following data:

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

### Click on payment details:

Click on **new**

Click on **arrow icon** and arrow down and choose the payment desired

Click on **ok**

Click on **close**

Click on **Finalize payment**

Click **yes** to comment

Click **ok** to print

Exit back to main Muffman screen







# Vehicle Enquiry:

Reference	Type	Date	Customer	Amount
18076	Invoice	14/08/1995	VITANZA TYRES	120.00

Click on **everyday**

Click on **vehicle enquiry** – type in registration # if customer has been in before, details will pop up.

Click on **preview** for details

Click on **whole page** and arrow down to 150%

Exit to return main menu

## Customer enquiry:

Customer Enquiry

Downing ... Steve

Surname: Given Names: Title: Code: 1005395

360 Beckett rd, Bridgeman Downs 40350

Add1:

Reference	Type	Date	Customer	Amount
37341	Invoice	08/09/2004	Steve Downing	139.00

Preview

Print

Vehicle

Click on **everyday**

Click on **customer enquiry** – type in customer’s surname

Click on box next to surname to display name, arrow up and down for correct name and ok

Click on **preview** for details

Click on **whole page** and arrow down to 150%

Exit to return main menu

## End of day procedures:

The image shows two overlapping software windows. The top window is titled "End Of Day" and contains the following elements:

- Buttons:  End of Week?,  End of Month?
- Button: Petty Cash
- Checked checkboxes:  Daily Sales and Cash,  Sales Summary,  Petty Cash
- Button: End of Day Processing

The bottom window is titled "Petty Cash Entry" and contains:

Petty Cash Type	Amount
POSTAGE & FREIGHT	11.00
MOTOR VEHICLE EXPENSES	11.00

Buttons: New, Edit, Delete

The "Petty Cash Details" sub-window is open, showing:

Type: P4 - MOTOR VEHICLE EXPENSES

Total Amount: 0.00

Gst Amount: 0.00

Buttons: OK, Cancel

Click on everyday

Click on end of day

Click on end of week or end of month

Click on petty cash

Click on new and arrow down to type of entry you want, type in amount

Click ok, then exit

Click on end of day processing

# Packages

## How to use Packages:

If you want to input a Package, example \$79 oil change or \$99 brake reline, click on Packages.

The screenshot shows the 'Invoice Entry' window with the following components:

- Buttons: New Invoice, Load Quote, Load Vehicle Profile, Cancel Invoice, Margin, Payment, Finalise.
- Fields: Invoice (on hold) 37502, Account ID 0, Name, Description 2, Qty On Hand.
- Checkboxes: Calcdeflabour (checked).
- Summary Table:

Packages	99.00
Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	99.00
- Navigation tabs: General, Customer/Vehicle, Parts, Packages, Labour/Discount, Comments.
- Package List Table:

Type >>	Description	Package ID	Labour	Total	Package price
BRKE01	\$99 FRONT DISC RELINE OFFER	13	\$35.00	\$104.00	\$99.00
- Part List Table:

Part >>	Description	Qty	Price	Total
BP1086	REAR BRAKE PADS	1.00	\$69.00	\$69.00
		1.00	\$0.00	\$0.00

Click on Package

Click on type >>

Arrow up or down to pick package

Click on package

Click ok

Click on part >> or Load Vehicle Profile bottom right "only"

Add parts that are need

Click ok

Continue on with Labour / Discount

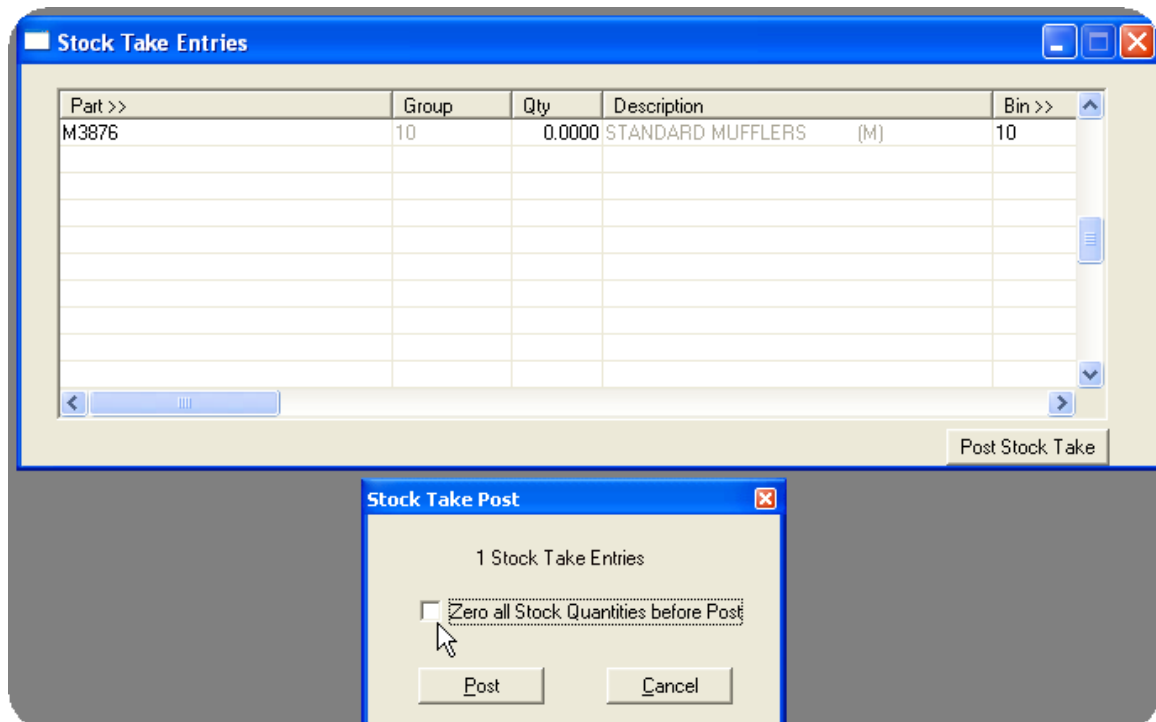
## **MAINTENANCE**

<b>Stock Take</b>	<b>(STOCK)</b>	<b>1</b>
<b>Stock Maintenance</b>	<b>(STOCK)</b>	<b>2</b>
<b>Changing Comments</b>	<b>(OTHER, SETUP)</b>	<b>3</b>
<b>Changing Customers Details</b>	<b>(CUSTOMER)</b>	<b>4</b>
<b>Changing Account Customers Details</b>	<b>(CUST.)</b>	<b>5</b>
<b>Changing Packages</b>	<b>(OTHER, MAINT.)</b>	<b>6</b>
<b>Make up new part #</b>	<b>(STOCK, MAINT.)</b>	<b>7</b>
<b>Account Customers Payment</b>	<b>(CUSTOMER)</b>	<b>8</b>

## **Reports & Reprints**

<b>Sales Analysis Report</b>	<b>(OTHER)</b>	<b>1</b>
<b>Reprint Customers Invoice</b>	<b>(CUSTOMER)</b>	<b>2</b>
<b>Reprint Customers Quote</b>	<b>(CUSTOMER)</b>	<b>3</b>
<b>Create Customer Letters</b>	<b>(CUSTOMER)</b>	<b>4</b>

# STOCK TAKE



Click on other, maintenance

Click on stock take

Type in part number, tab across

**!!!!!!!!!!!!!! To do a complete stock take enter all parts first !!!!!!!!!!!**

Click zero all stock quantities before post

Click post

If you only want to change a couple of parts then

**Don't click** "Zero all stock quantities before post"

# STOCK MAINTENANCE

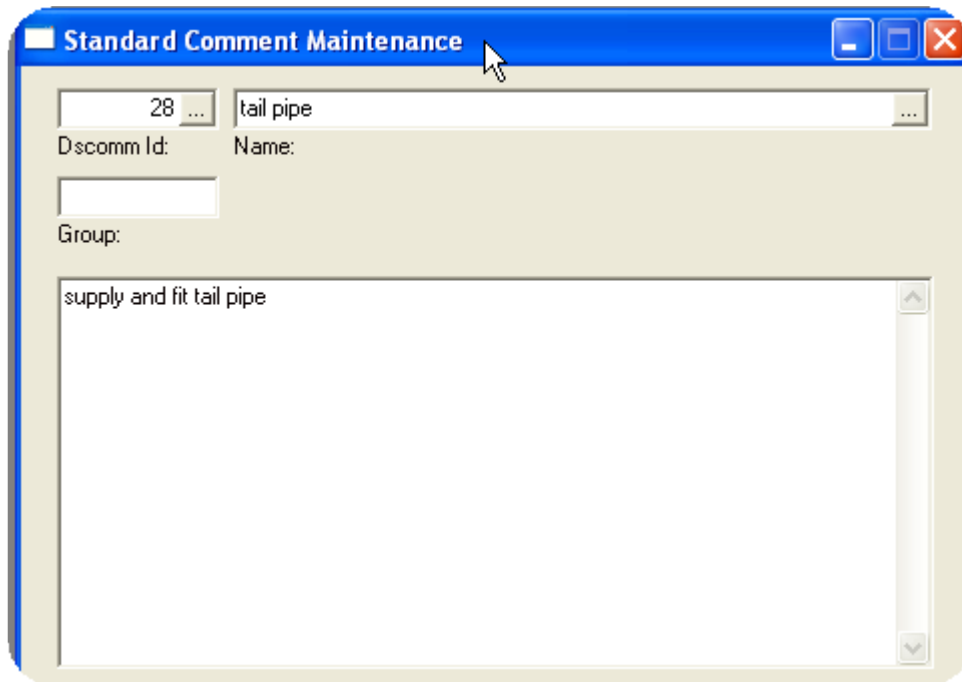
To change part details: example, price, bin location, description

The screenshot shows a software window titled "Stock Maintenance". At the top, there is a blue title bar with standard window controls. Below the title bar, the main area is divided into several sections. On the left, there are input fields for "Part", "Group", "Retail without GST" (displaying "\$0.00"), and "Retail with GST" (displaying "\$0.00"). A "Change Group" button is located next to the Group field. To the right of these fields, there is a checked "Active" checkbox and a "Descriptions" section with several empty text boxes. Below these fields is a tabbed interface with tabs for "General", "Pricing", "Alternates", "Makeup Parts", "Transactions", and "Notes". The "General" tab is currently selected. It contains various fields: "Bin" (10), "Bin Name" (NON STOCK ITEMS), "Preferred Supplier" (1), "Supplier Name" (AUSSIE EXHAUST & REPAIRS), "Type" (Normal Part), "Min Reorder", "Sales Units" (1), "Max Reorder", "Issue" (EACH), and "Usage Category". On the right side of the "General" tab, there are checkboxes for "GST Exempt", "Serial No Tracking", "Auto Calc", and "Discount Flag", along with input fields for "Qty On Hand" (\$0.00), "Value On Hand", "Qty On Purchase Order" (/ /), and "Last Changed". At the bottom right of the "General" tab, there are two small input boxes for "Labour Hours/Min".

- Click on other, maintenance
- Click on stock maintenance
- Type in part number
- Hit f9 key, this brings up details
- Tab through to make changes

## Adding or changing Standard comments

To add your own comment:

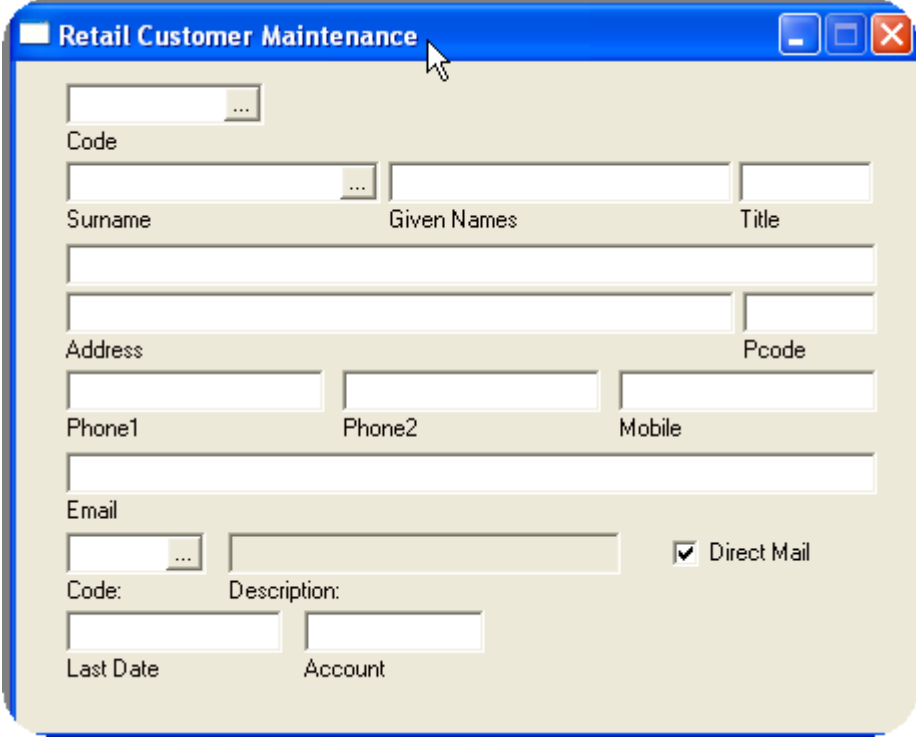


The screenshot shows a window titled "Standard Comment Maintenance". It contains the following fields and controls:

- A dropdown menu for "Dscomm Id:" with the value "28" and a scroll arrow.
- A text input field for "Name:" containing "tail pipe" and a scroll arrow.
- An empty text input field for "Group:".
- A large text area for the comment description containing "supply and fit tail pipe".

Click on **other, setup** scroll over to **standard comments** and click  
Click on **Dscomm Id:**, scroll down to last # , cancel out and type in #,  
Click in **name** area and type in description example (muffler), then click  
in big area and type in full description, example (supply and fit rear  
muffler). Then go to save. Exit back to main screen.

## To change customers details



The screenshot shows a window titled "Retail Customer Maintenance" with a blue title bar and standard window controls. The form contains the following fields:

- Code: A dropdown menu with a small "..." button to its right.
- Surname: A text input field.
- Given Names: A text input field.
- Title: A text input field.
- Address: A large text input field.
- Pcode: A text input field.
- Phone1: A text input field.
- Phone2: A text input field.
- Mobile: A text input field.
- Email: A text input field.
- Code: A dropdown menu with a small "..." button to its right.
- Description: A text input field.
- Direct Mail: A checked checkbox.
- Last Date: A text input field.
- Account: A text input field.

- Click on other, maintenance
- Click on retail customer maintenance
- Click on code box to drop down customer
- Click on surname, type in
- Click ok, find customer then ok
- Hit tab to make changes
- At end click save, click yes to save

## To change Account customers details

Account Customer Maintenance

Account ID: 11 ...

Describe: KEDRON MECHANICAL SERVICES ...

Contact 1: LANCE JAGGER

Active:

Owed: \$0.00

General | Contact Information | Transactions | Notes | Discounts | New Transaction

Group: 1 ...

Description: WORKSHOP TRADE

Price: \$0.00

Credit Limit:

A.B.N.

Last Payment Date: 08/09/1999

Open Item:

Wholesale:

90 Days+ \$0.00

60 Days \$0.00

30 Days \$0.00

Current \$0.00

Total \$0.00

- Click on other, maintenance
- Click on Account customer maintenance
- Click on Account ID box to drop down customer
- Click on Account Customers name
- Click ok, find customer then ok
- Hit tab to make changes
- At end click save, click yes to save

# Changing Packages

Package Maintenance

Code: [ ] Name: [ ]

Status: Active Start Date: // End Date: //

Labour Amount: [ ] Actual Price: [ ] Levy Type: None Levy Amount: \$0.00

Code: [ ] Jobtype: [ ]

Stock Part >>	Group >>	Description 2	Quantity

- Click on other, maintenance, down to package maintenance
- Click on package maintenance
- Click on code
- Arrow up or down to choose package
- Click ok
- Click in different areas to change then save

# STOCK MAINTENANCE

## “MAKE UP PARTS”

The screenshot shows a software window titled "Stock Maintenance". At the top, there is a search bar and a "Part" field. Below this are fields for "Group" and "Group Description", with "Retail without GST" and "Retail with GST" values both set to "\$0.00". A "Change Group" button is located to the right. On the right side of the window, there are several empty text boxes under the heading "Descriptions".

Below the main input fields is a tabbed interface with the following tabs: "General", "Pricing", "Alternates", "Makeup Parts", "Transactions", and "Notes". The "General" tab is currently selected and contains the following fields:

- Bin:** 10, **Bin Name:** NON STOCK ITEMS
- Preferred Supplier:** 1, **Supplier Name:** AUSSIE EXHAUST & REPAIRS
- Type:** Normal Part (dropdown), **Min Reorder:** [empty]
- Sales Units:** 1, **Max Reorder:** [empty]
- Issue:** EACH, **Usage Category:** [empty]
- Checkboxes:**  GST Exempt,  Serial No Tracking,  Auto Calc,  Discount Flag
- Labour Hours/Min:** [empty]
- Value Fields:** **Qty On Hand:** [empty], **Value On Hand:** \$0.00, **Qty On Purchase Order:** [empty], **Last Changed:** / /

Click on other, maintenance  
Click on stock maintenance  
Clear all if part comes up  
To make up a new part  
Type in part number and tab all the way through to alternates and then  
exit out to save

# Account Customers Payment

Account ID: [ ] [E] ...

Descrpt: CALTEX S/S EAGLE FARM [ ] ...

Contact 1: RV & LN NOMINEES PTY LTD

Owed: \$0.00

Active:

General | Contact Information | Transactions | Notes | Discounts | New Transaction

Payment [ ]

Type

Amount [ ] Gst [ ]

GL Code [ ]

Reference [ ]

GL Narrative [ ]

Details [ ]

Payment [ ] Post [ ]

Other

Maintenance

Account customer maintenance

Click on account ID drop down box and choose the acc. Customer you want.

Click ok

Click on transactions write down the Ref # and amount you want to pay off.

Click on new transaction

Click on amount and type in the amount paying

Click on Reference and type in the Ref # you wrote down.

Click on detail, this can be what ever you want, example check #, cash, credit card.

Click on payment

Click on new

Click on drop down box, choose which method of payment

Click ok

Click close

Click post

# Reports “Sales Analysis Report”

Click on others, reports,

Click on sales analysis by job type

Click on today, this week, this month or enter date range you wish to use,  
example: 01/09/04 to 30/09/04

Click on preview, and then click on print to preview

## Sales Analysis by Job Type

From 01/09/2004 to 30/09/2004

All values are exclusive of GST

Store: 0001 Clockwork Computing Test Site

34 Invoices, No Credit Notes

Number Of Jobs	Exhaust System :		Braking System :		Shocks & Springs :		Oil Change :		Maintenance Service :	
	23 ↓	%	11 ↓	%	0 ↓	%	3 ↓	%	33 ↓	%
Part Sales	3588.36	81.9	848.40	45.5	0.00	0.0	0.00	0.0	438.56	55.1
Labour	794.00	18.1	817.00	43.8	0.00	0.0	0.00	0.0	357.00	44.9
Service Charge :	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0
Packages :	0.00	0.0	196.00	10.6	0.00	0.0	209.85	100.0	0.00	0.0
<b>Total</b>	<b>4382.36</b>		<b>1863.40</b>		<b>0.00</b>		<b>209.85</b>		<b>795.56</b>	
Discount On Retail	-783.08	-17.8	-10.00	-0.4	0.00	0.0	0.00	0.0	-0.95	0.0
Gross Revenue	3599.28		1853.40		0.00		209.85		794.61	
Cost of Goods :	1253.77	35.1	246.52	13.3	0.00	0.0	0.00	0.0	215.11	27.1
Gross Profit	2335.51	64.9	1606.88	86.7	0.00	0.0	209.85	100.0	579.50	72.9

Number Of Jobs	Alignment & Steering :		Drivetrain & Clutch :		Cooling System :		OTHER :		TOTAL :	
	0 ↓	%	0 ↓	%	0 ↓	%	0 ↓	%	70 ↓	%
Part Sales	0.00	0.0	0.00	0.0	0.00	0.0	40.00	100.0	4915.32	67.4
Labour	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1968.00	27.0
Service Charge :	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0
Packages :	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	407.85	5.6
<b>Total</b>	<b>0.00</b>		<b>0.00</b>		<b>0.00</b>		<b>40.00</b>		<b>7291.17</b>	
Discount On Retail	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	-794.03	-10.8
Gross Revenue	0.00		0.00		0.00		40.00		6497.14	
Cost of Goods :	0.00	0.0	0.00	0.0	0.00	0.0	67.4	16.9	1732.14	26.7
Gross Profit	0.00	0.0	0.00	0.0	0.00	0.0	33.25	83.2	4765.00	73.3

Total Rounding: -0.02  
 Total GST: 645.41  
 Gross Revenue (with GST): 7142.53

# Reprint

## Customers Invoice

Click on other, reprint

Click on customer invoice

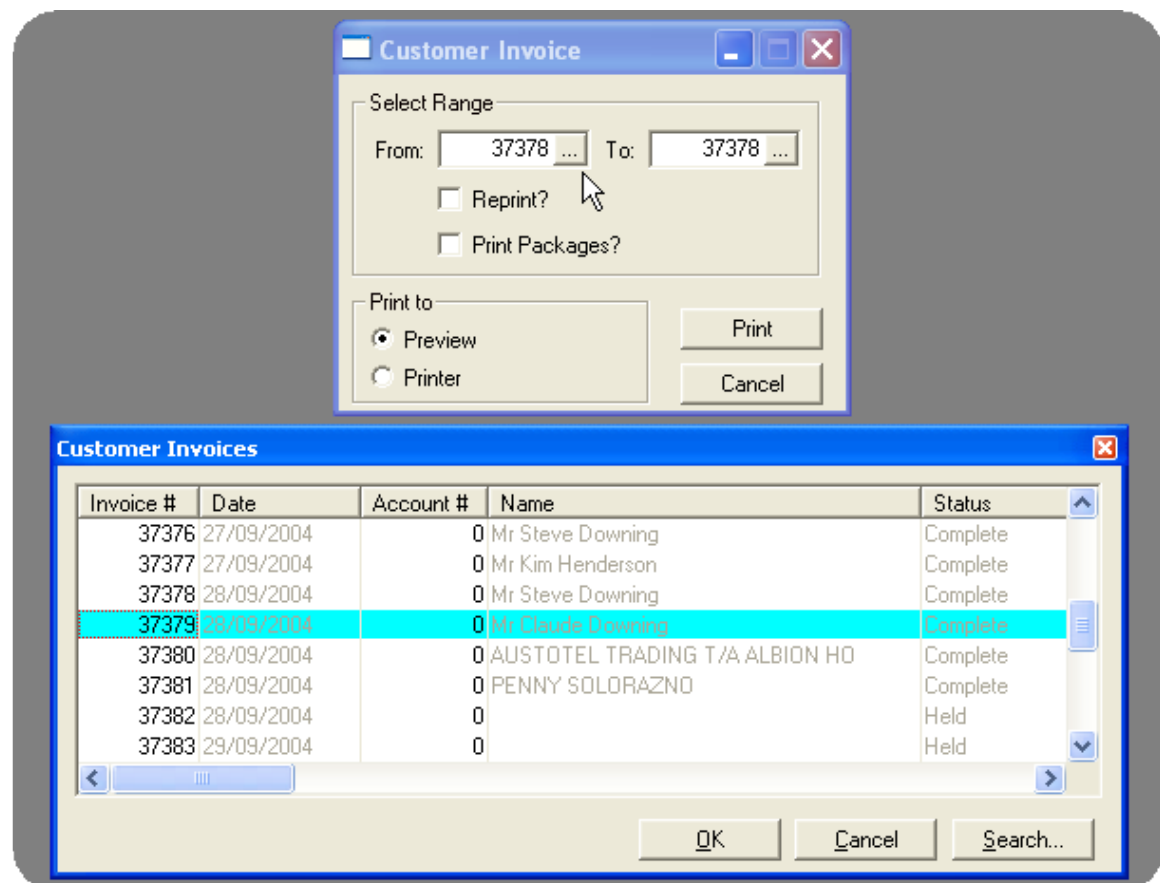
Click on tab box in from: arrow up or down to date or invoice

Click on to and type in invoice number

Click on ok

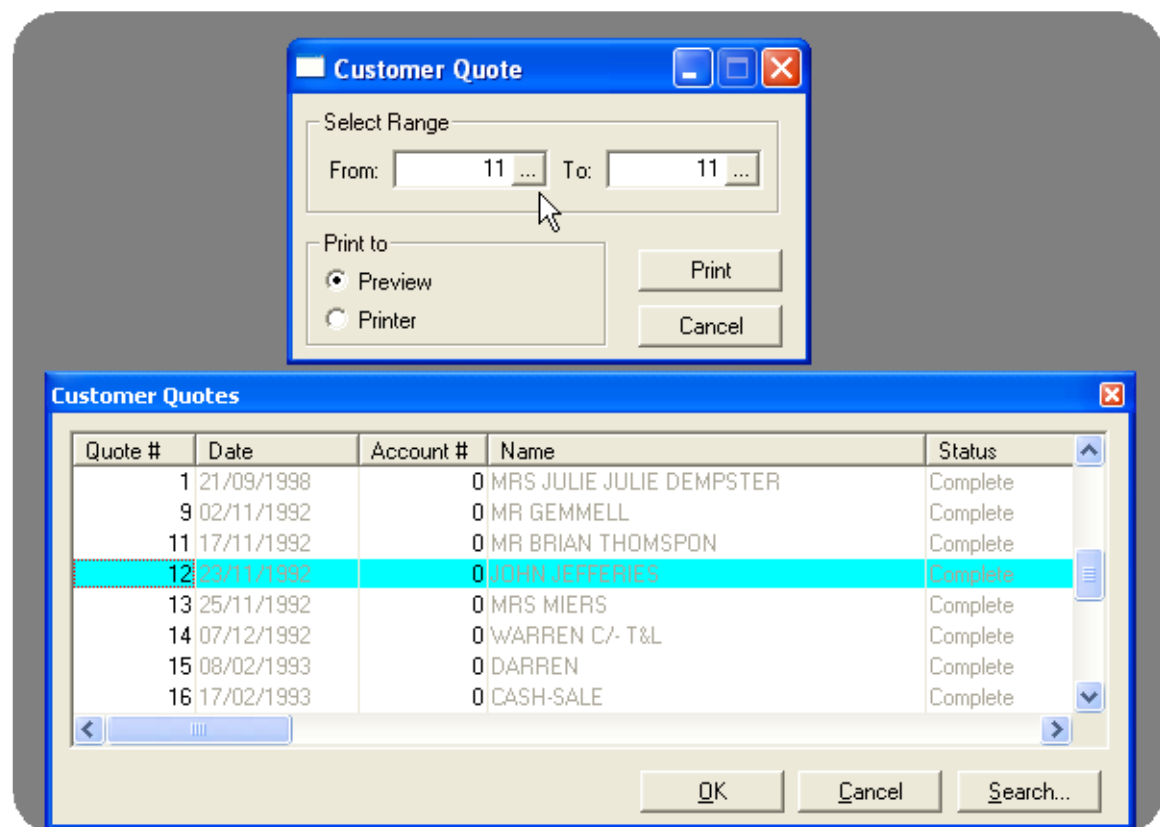
Click on preview and print

Click on print to print



# Reprint Customer Quote

- Click on other, reprint
- Click on customer Quote
- Click on tab box in from: arrow up or down to date or invoice
- Click on to and type in invoice number
- Click on ok
- Click on preview and print
- Click on print to print



# CREATE CUSTOMER LETTERS

**Export Invoice Information**

Select Date Range

Today  This Week  This Month

Month to Date  Year to Date

Enter Date Range

From:  To:

Select Ranges

Jobtype:

Minimum Total:

Post Code:  To:

Include Account Customers

Include No Direct Mail

Output

Email  Print  View

Subject Line

Merge File

Click on other, reprint

Click on create customer letters

## **Select date range:**

Select Job type: example all job type, oil change or braking system

**Minimum Total:** leave blank or you can put in an amount if you want only customers that spend over that amount to receive letters or e-mail.

**Post code:** leave blank unless you have a certain postal area you're targeting.

**Include account customer:** only tick if you want to include them in your mail out.

**Include no direct mail:** leave blank (only for recall purposes)

**Output:** if you click e-mail it will go direct to the customer via e-mail

**Print:** will print and **view:** will let you view (suggest you view all first)

Click on **Browse:** to choose letter you want, click **Process:** when ready to send e-mail or letters