

Quick Reference Manual



Computer Information System

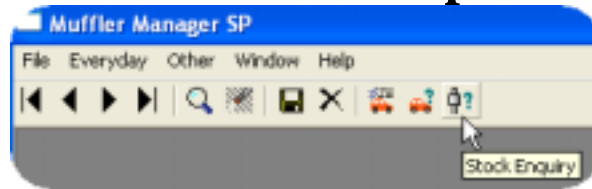
Version 1

INDEX

From Main Menu: **(Everyday)**

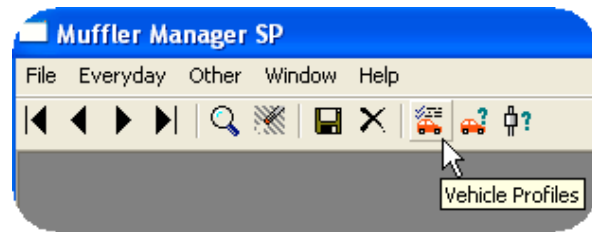
<u>Raise a Quote:</u>	1-6
Raise an Invoice from a Quote:	7-8
<u>Raise an Invoice: “without a Quote”</u>	9-15
Raise a Customers Credit Note:	16-21
<u>Entering a suppliers invoice:</u>	22
Raise a Suppliers Credit Entry:	23
Raise a Suppliers Purchase Order:	24
Vehicle Enquiry:	25
Customer Enquiry:	26
End of Day:	27
Packages	28
<u>Raise an account customer invoice</u>	9-15

Parts Look Up



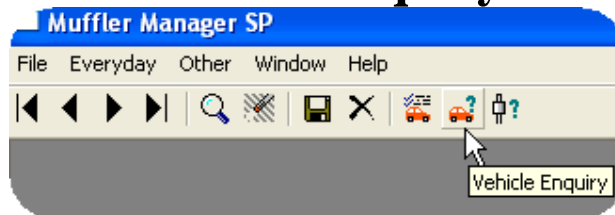
TYPE IN # USE (F9) TO LOAD AND (F7, F8) TO SCROLL FORWARD OR BACKWARD

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”

Parts Total	0.00
Labour	0.00
Discount	0.00
Gst	0.00
TOTAL	0.00

Click on **Everyday**

Click on **customer Quote**

Click on **New Quote** (or **Quote on hold** or **Account ID** if you know it's on hold).

Raise a Quote: (cont'd)

Customer/Vehicle:

The screenshot shows a software interface with a tabbed menu at the top: General, Customer/Vehicle, Parts, Packages, Labour/Discount, and Comments. The 'Customer/Vehicle' tab is active. The form is divided into two main sections. The left section contains fields for: Code (0), Surname (DOWNING), Given Names (STEVE), Title (A), Address / Suburb (9999 BECKETT RD), Post Code (BRIDGEMAN DOWNS, 4035), Business Phone (1244524), After Hours, Mobile (978-02-4911), Email (steved@clockworkcomputing.com), and a checked 'Direct Mail' option. The right section contains fields for: Registration (FUN 321), Vin Number (KDKF0393040EKDL), Make (MERCEDES), Model (350SL), Year (1974), Style (SEDAN), Rego Day/Month (12, 5), Engine Number (09D0DFK9ED.K0K1K), Colour (SILVER), and Odometer.

Customer/Vehicle:

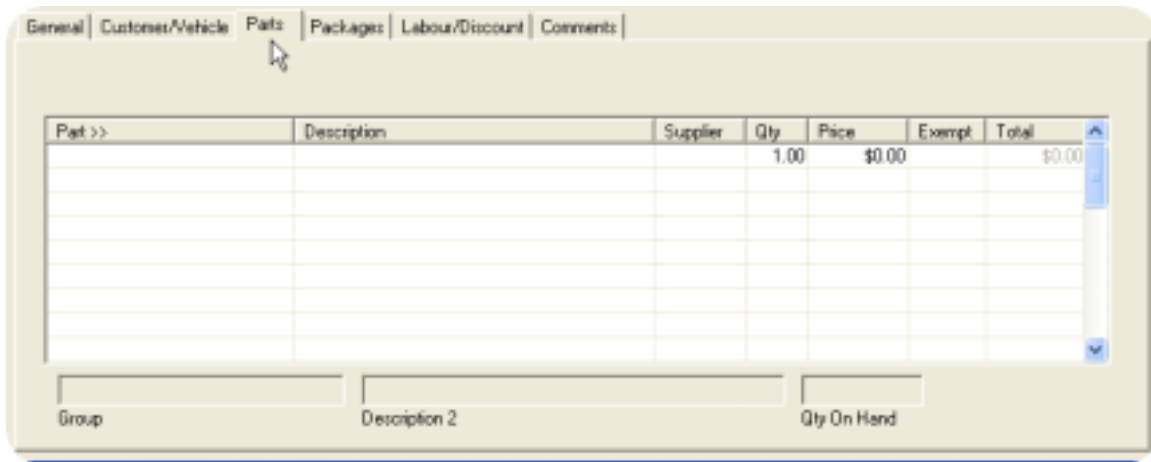
Click on **customer/vehicle**

Click on **surname**, enter Surname, then click on drop down box in Surname area, find Surname and OK, if not their cancel and tab through to suburb. After entering suburb click on drop down box to retrieve post code, tab through to finish Customer details.

Click on registration, type in Rego. then click on drop down box in Rego. area, find Rego. and OK, if not their cancel and tab through to finish.

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, Qty (1.00), Price (\$0.00), Exempt, and Total (\$0.00). Below the table, there are three input fields labeled 'Group', 'Description 2', and 'Qty On Hand'.

Parts:

Click on line under **parts>>** – type in parts if you know the part number
“Double click on part No. to delete if wrong No. USE THE SHIFT F2 TO DELETE LINE IF WRONG PART No. USED” or F5 to Clear if invalid No. (not a No. in system)

Click on **load vehicle profile** if needed to retrieve part number

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) or scroll up or down

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:

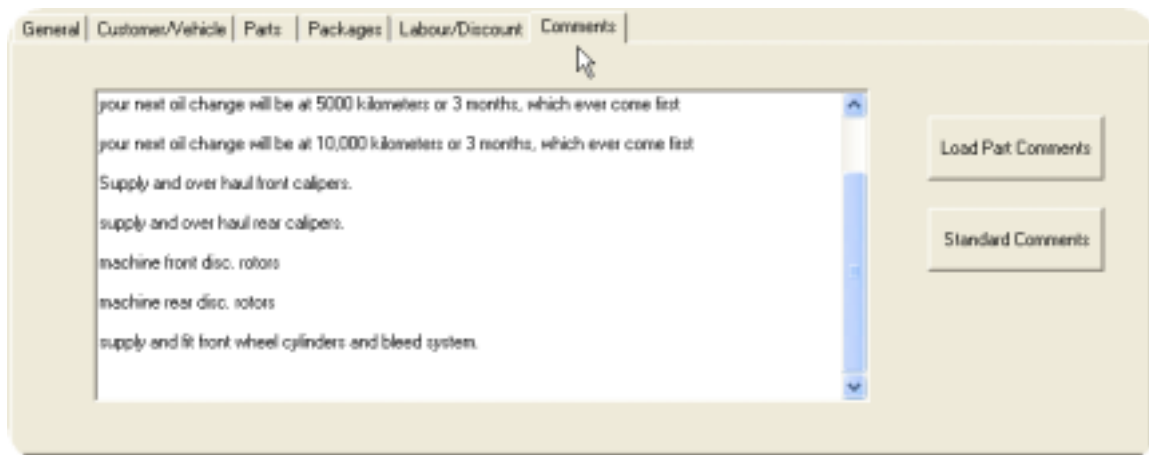
If you want to input a Package, example \$79 oil change or \$99 brake reline, click on Packages.

The screenshot shows the 'Quote Entry' window with the 'Packages' tab selected. The interface includes a top navigation bar with 'New Quote', 'Load Vehicle Profile', and 'Cancel Quote' buttons. Below this are input fields for 'Quote (on hold)', 'Name', and 'Account ID', along with a 'Margin' button and a 'Calculate Labour' checkbox. A summary table on the right shows 'Parts Total', 'Labour', 'Discount', and 'TOTAL' all at 0.00. The main area contains two tables: 'Type >>' and 'Part >>'. The 'Type >>' table has columns for 'Description', 'Package ID', 'Labour', 'Total', and 'Package price'. The 'Part >>' table has columns for 'Description', 'Qty', 'Price', and 'Total'. At the bottom, there are fields for 'Description 2' and 'Qty On Hand', and a 'Load Vehicle Profile' button.

- Click on Package
- Click on type >>
- Arrow up or down to pick package
- Click on package
- Click ok
- Click below on part >> or Load Vehicle Profile bottom right “only”
- Add parts that are need – tab across
- Click ok
- Continue on with Labour / Discount

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:

Click on **everyday**

Click on **Customer invoice**

Click on **new invoice**

Click on **load quote**

Click on **Qtem Id** drop down box and scroll to customer

Click on **customer's name**

Click **ok**

Click on **load quote**

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

Click **ok**

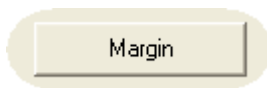
Before finishing invoice:

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

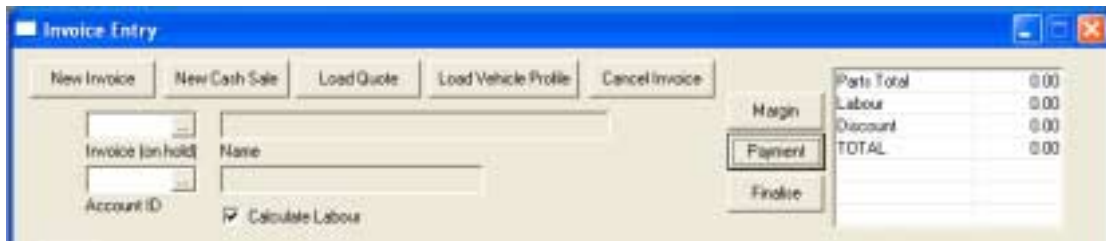
Raising an Invoice from a Quote: (cont'd)

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:



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

Click on **Everyday**

Click on **customer invoice**

Click on **New invoice** or “**New Cash Sale**” if you want a cash sale only
(this will take you straight to **parts.**)

Click on **Invoice on hold** or **account ID, drop down box** If you know
it's on hold or there an account customer otherwise start **New Invoice**

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

Customer/Vehicle:

The screenshot shows a software interface with a tabbed menu at the top: General, Customer/Vehicle, Parts, Packages, Labour/Discount, and Comments. The 'Customer/Vehicle' tab is active. The form is divided into two main sections. The left section is for customer details, with fields for Code (1005506), Surname (DOWNING), Given Names (STEVE), Title (MR), Address / Suburb (999 BECKETT RD, BRIDGEMAN DOWNS), Post Code (4035), Business Phone, After Hours, Mobile (0412621619), and Email (steved@clockworkcomputing.com.au). There is a checked box for Direct Mail. The right section is for vehicle details, with fields for Registration (FLIN 321), Vin Number (KDKFO393040EKDL), Make (MERCEDES), Model (350SL), Year (1974), Style (SEDAN), Rego Day/Month (12/5), Engine Number (05D0DFKE9ED.K0K1K), Colour (SILVER), and an empty field for the Odometer.

Customer/Vehicle:

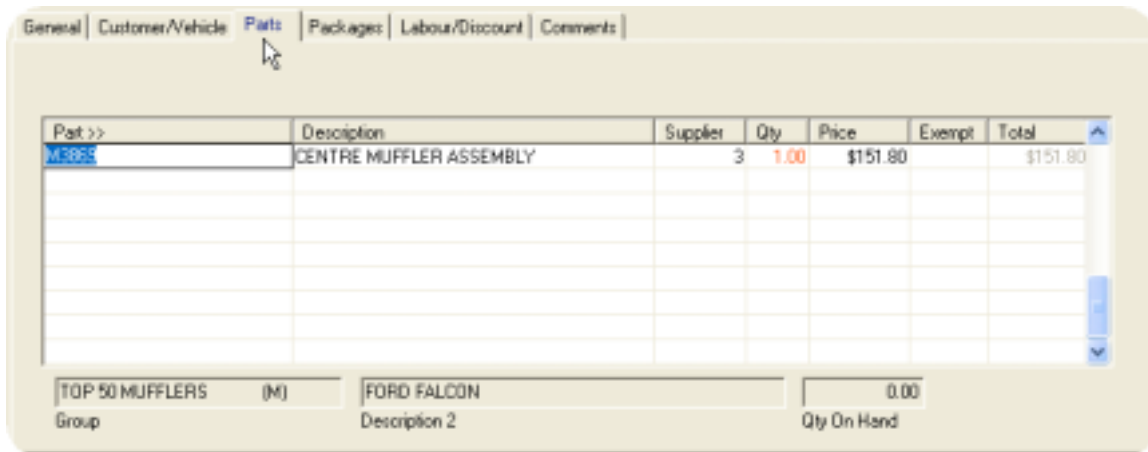
Click on **customer/vehicle**

Click on **surname**, enter Surname, then click on drop down box in Surname area, find Surname and OK, if not their cancel and tab through to suburb. After entering suburb click on drop down box to retrieve post code, tab through to finish Customer details.

Click on registration, type in Rego. then click on drop down box in Rego. area, find Rego. and OK, if not their cancel and tab through to finish.

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

Parts:



Part >>	Description	Supplier	Qty	Price	Exempt	Total
M3085	CENTRE MUFFLER ASSEMBLY		3	1.00		\$151.80

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

Parts:

Click on line under **parts>>** – type in parts if you know the part number
“Double click on part No. to delete if wrong No. USE THE SHIFT F2 TO DELETE LINE IF WRONG PART No. USED” or F5 to Clear if invalid No. (not a No. in system)

Click on **load vehicle profile** if needed to retrieve part number

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) or scroll up or down

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.

The screenshot shows the 'Invoice Entry' window with the 'Packages' tab selected. The interface includes a top menu bar with 'New Invoice', 'Load Quote', 'Load Vehicle Profile', and 'Cancel Invoice'. Below this are input fields for 'Inv#', 'Name', 'Cum#', and a checked 'Caloflabour' checkbox. A summary table on the right shows 'Parts Total', 'Labour', 'Discount', and 'TOTAL' all at 0.00. The main area contains two tables: 'Package' and 'Part'. The 'Package' table has columns for 'Type >>', 'Description', 'Package ID', 'Labour', 'Total', and 'Package price'. The 'Part' table has columns for 'Part >>', 'Description', 'Qty', 'Price', and 'Total'. A 'Load Vehicle Profile' button is located at the bottom right.

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

Part >>	Description	Qty	Price	Total
		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 below on part >> or Load Vehicle Profile bottom right "only"

Add parts that are need – tab across

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
EXH1	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.

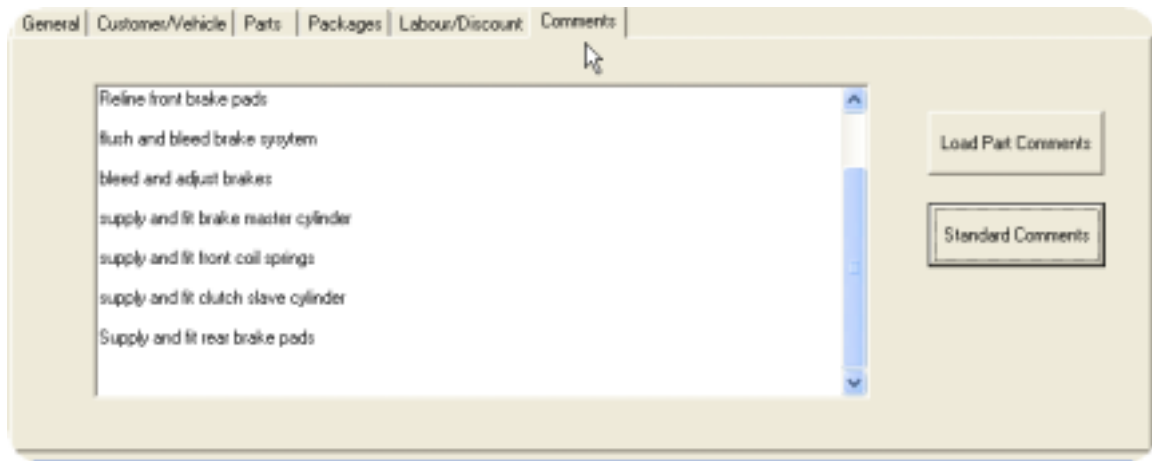
Margin:

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**

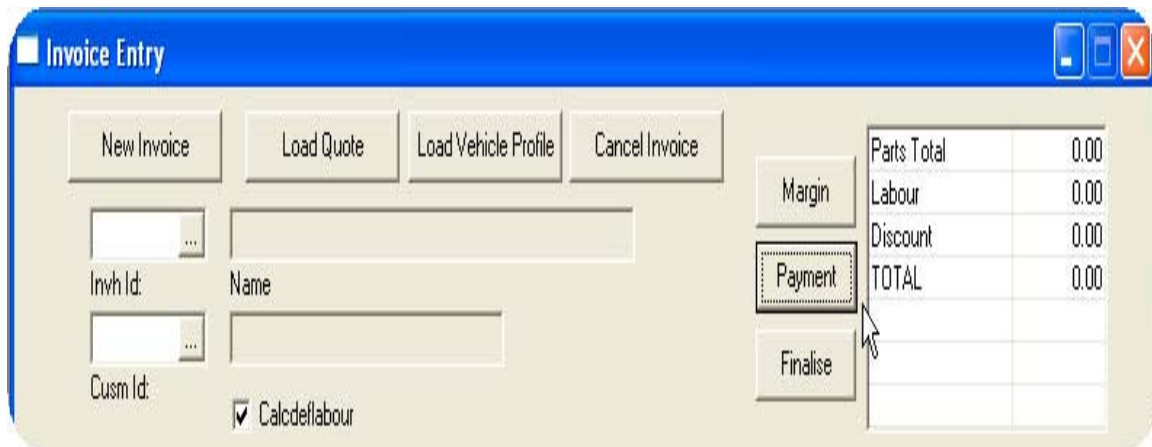
Click on **standard comments** (scroll to comment you want)

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, Margin, Payment (highlighted with a dotted border), Finalise.
- Fields: Invh Id: (with a dropdown arrow), Name, Cusm Id: (with a dropdown arrow), Calcdefflabour.
- 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:

Credit Note Entry

New Credit Note Load Invoice Load Vehicle Profile Cancel Credit Note

Credit (on hold) Name

Account ID Original Invoice

Calodelabour

Margin Payment Finalize

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

General Customer/Vehicle Parts Labour/Discount Comments

Price 1
Price
Inclusive
Gst Type
\$0.00
Sundries

Customer Credit Note:

Click on **Everyday**

Click on **customer credit**

Click on **credit (on hold)** drop down box if you know it's on hold, otherwise

Click on **new credit note**

Click on **Account Id** drop down box if you want an account customer

Click on **Load invoice**

Click on Load invoice drop down box and scroll up or down for invoice to credit or type in invoice # then ok.

Click OK again

Click load invoice

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 selected. The form is divided into two main sections. The left section 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 section 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 small '...' icon indicating a dropdown menu.

Customer/Vehicle:

Click on **customer/vehicle**, if you have chosen an invoice details will appear. IF not

Click on **surname**, enter customer's details and vehicle details by using the tab key. Follow procedure as if you were doing an invoice.

Raise a Customer credit note: (cont'd)

Parts:

Parts Total	0.00
Labour	0.00
Discount	0.00
TOTAL	0.00

Parts:

Click on line under **parts**>> – type in parts if you know the part number
“Double click on part No. to delete if wrong No. USE THE SHIFT F2 TO DELETE LINE IF WRONG PART No. USED” or F5 to Clear if invalid No. (Not a No. in system)

Click on **load vehicle profile** if needed to retrieve part number

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) or scroll up or down

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.**

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 input fields and buttons. At the top, there are buttons for 'New Credit Note', 'Load Invoice', 'Load Vehicle Profile', and 'Cancel Credit Note'. Below these are fields for 'Credit (on hold)', 'Account ID', 'Name', and 'Original Invoice'. A checkbox labeled 'Calcdlabour' 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 'Labour/Discount' tab contains the following fields:

- Price 1: [dropdown]
- Price: [input field]
- Inclusive: [dropdown]
- Gst Type: [input field]
- [input field] \$0.00
- Sundies: [input field]

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 then tab through.

Raise a Customer credit note: (cont'd)

Comments:

Price 1
Price
Inclusive
Gst Type
Sundies \$0.00

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:



Credit Note Entry			
New Credit Note	Load Invoice	Load Vehicle Profile	Cancel Credit Note
<input type="text"/>	<input type="text"/>		
Credit (on hold)	Name:	<input type="text"/>	Margin
<input type="text"/>	<input type="text"/>	<input type="text"/>	Payment
Account ID	<input type="text"/>	Original Invoice	Finalize
<input type="checkbox"/> Calcdelabour			
		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

Customer enquiry:

Customer Enquiry

Downing Steve 1005395
Surname: Given Names: Title: Code:

360 Becklett 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 name, click on drop down box to see if customer has been in before, details will pop up.

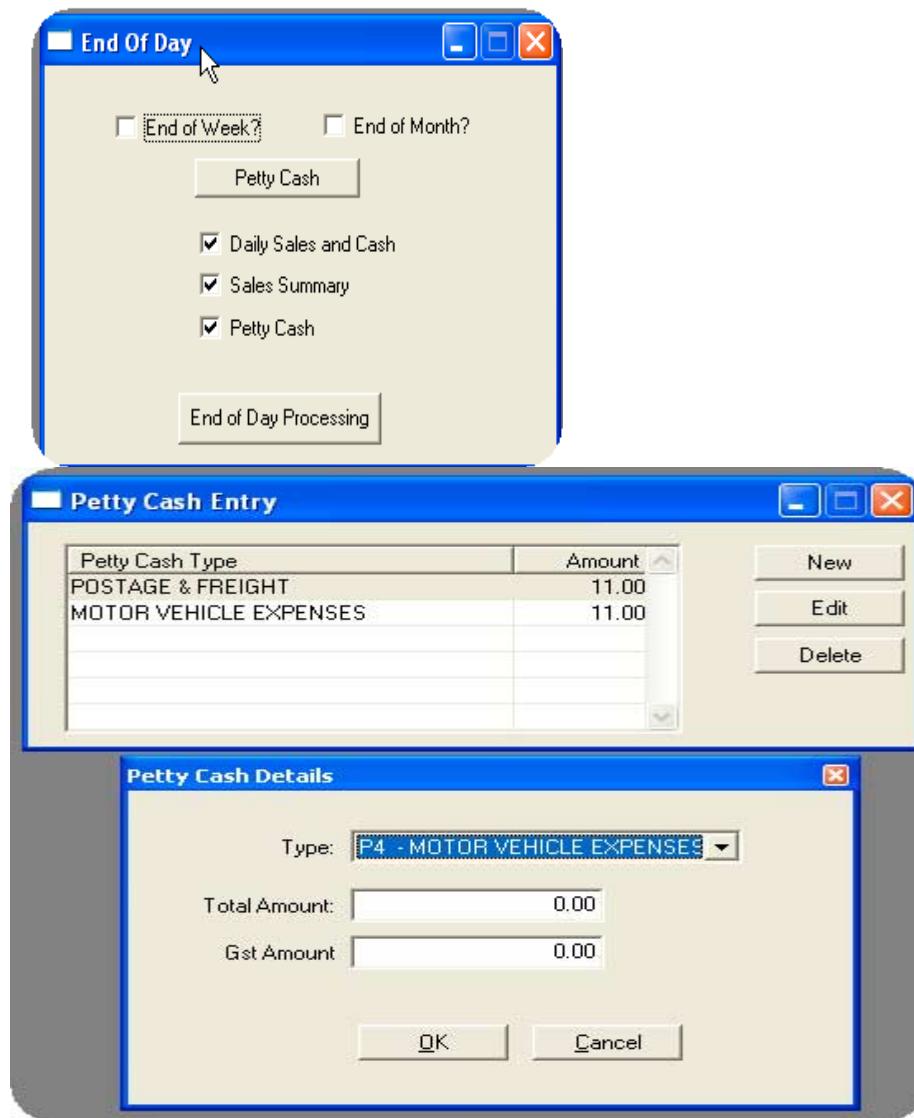
Click OK, Choose invoice or quote

Click on **preview** for details

Click on **whole page** and arrow down to 150% - print if desired

Exit to return main menu

End of day procedures:



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 'Packages' tab selected. The interface includes buttons for 'New Invoice', 'Load Quote', 'Load Vehicle Profile', and 'Cancel Invoice'. There are input fields for 'Invoice (on hold)' (37502), 'Name', and 'Account ID'. A 'Margin' section shows a summary table:

Margin	Packages	99.00
Payment	Parts Total	0.00
Finalize	Labour	0.00
	Discount	0.00
	TOTAL	99.00

The 'General' tab is active, showing a table of packages:

Type >>	Description	Package ID	Labour	Total	Package price
BRKE01	\$99 FRONT DISC RELINE OFFER	1.0	\$35.00	\$104.00	\$99.00

Below this is a table for parts:

Part >>	Description	Qty	Price	Total
BP108E	REAR BRAKE PADS	1.00	\$63.00	\$63.00
		1.00	\$0.00	\$0.00

At the bottom, there are fields for 'Description 2' and 'Qty On Hand', and a 'Load Vehicle Profile' button.

- Click on everyday
- Click on customer invoice
- Click on new invoice then customer/vehicle and enter details
- 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

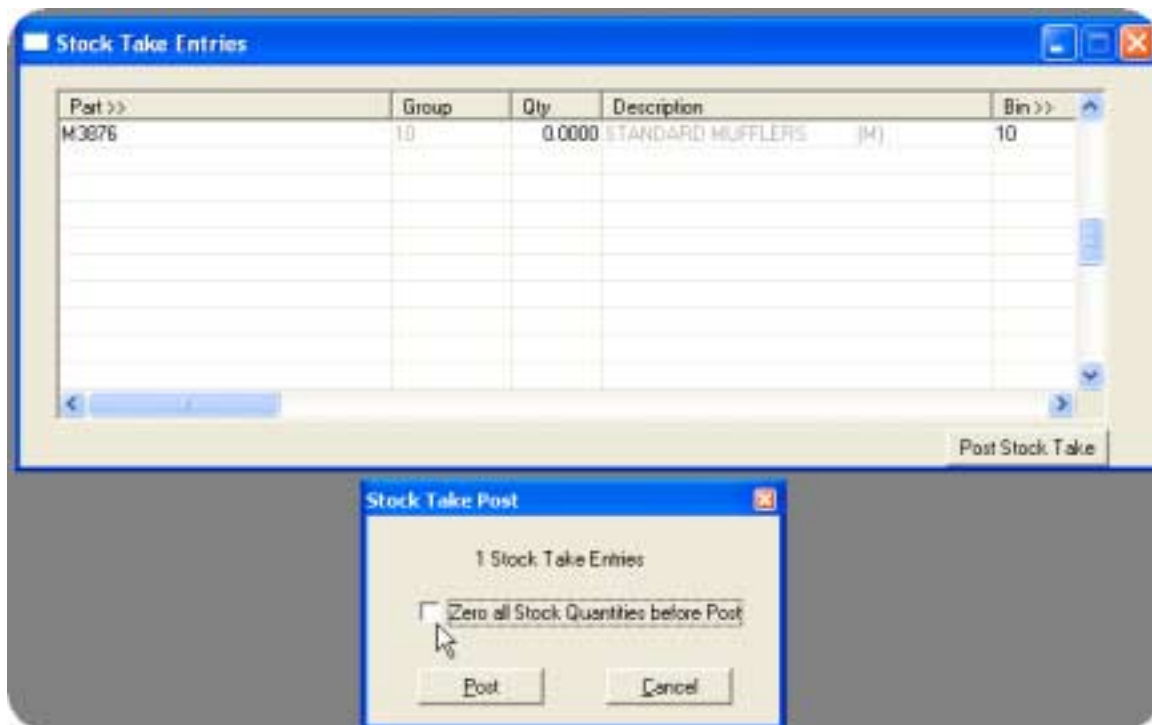
MAINTENANCE

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

Reports & Reprints

Sales Analysis Report	(OTHER)	1
Reprint Customers Invoice	(CUSTOMER)	2
Reprint Customers Quote	(CUSTOMER)	3
Create Customer Letters	(CUSTOMER)	4
Adding New Account Customer	(CUST)	5

STOCK TAKE



“Read First”

Click on stock

Click on stock take entry

Type in part number, tab across

Click on post stock take

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

Click zero all stock quantities before posting, this will zero all stock and only post what you have entered

**If you only want to change a couple of parts then
Don't click “Zero all stock quantities before post”**

STOCK MAINTENANCE

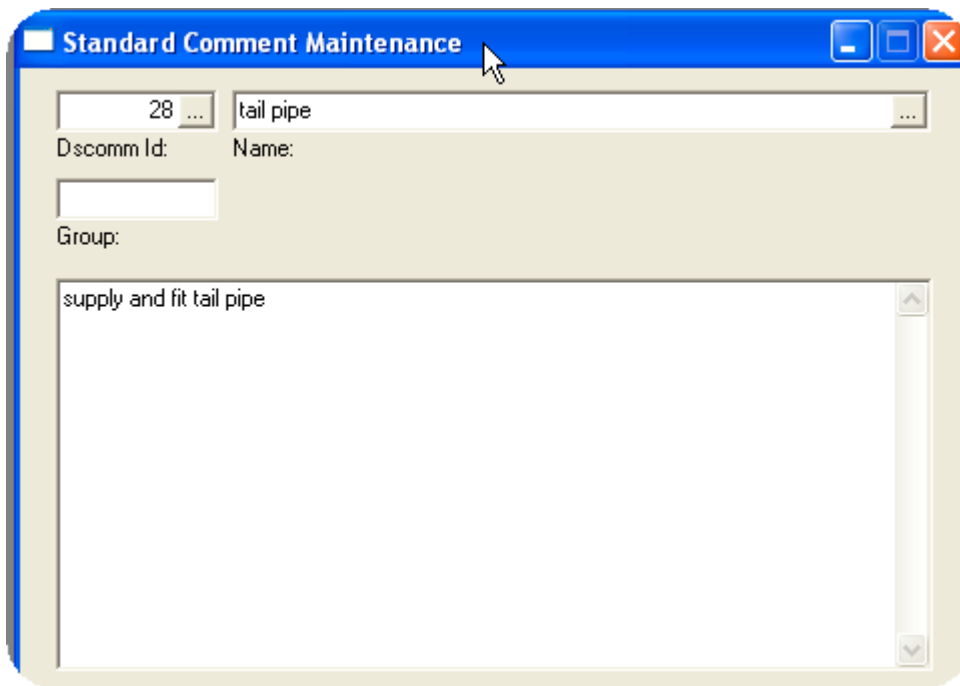
To change part details: example, price, bin location, description

The screenshot shows a software window titled "Stock Maintenance". At the top, there is a "Part" field with a dropdown arrow and an "Active" checkbox which is checked. Below this is a "Group" field with a dropdown arrow and a "Change Group" button. To the right of the "Group" field are two price fields: "Retail without GST" and "Retail with GST", both containing "\$0.00". Further right is 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 selected. In this tab, there are fields for "Bin" (containing "10"), "Bin Name" (containing "NON STOCK ITEMS"), "Preferred Supplier" (containing "1"), and "Supplier Name" (containing "AUSSIE EXHAUST & REPAIRS"). There are also checkboxes for "GST Exempt", "Serial No Tracking", "Auto Calc", and "Discount Flag". On the right side of the "General" tab, there are fields for "Qty On Hand" (containing "\$0.00"), "Value On Hand", "Qty On Purchase Order", and "Last Changed". At the bottom, there are fields for "Type" (containing "Normal Part"), "Sales Units" (containing "1"), "Issue" (containing "EACH"), "Min Resorder", "Max Resorder", "Usage Category", and "Labour Hours/Min".

- Click on stock
- 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 software window titled "Standard Comment Maintenance". The window has a blue title bar with standard Windows window controls (minimize, maximize, close). The main content area is light beige and contains the following fields:

- A "Dscomm Id:" field with a dropdown menu showing "28 ...".
- A "Name:" field with a text input containing "tail pipe" and a dropdown arrow on the right.
- A "Group:" field with an empty text input.
- A large text area containing the text "supply and fit tail pipe".

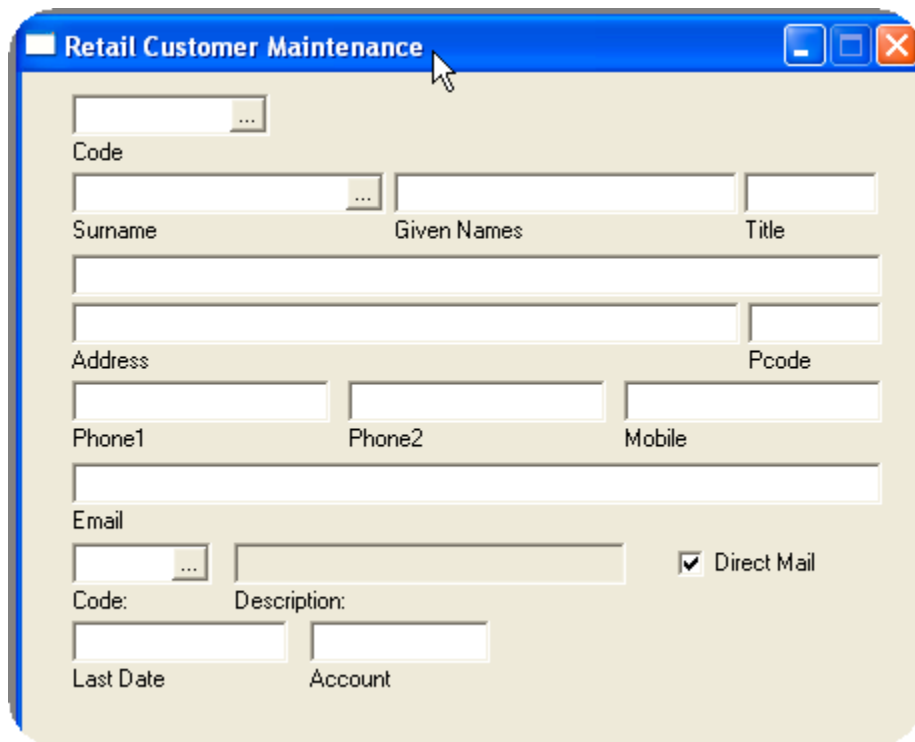
Click on **other, setup** scroll over to **standard comments** and click
Click on **Dscomm Id:** drop down box to change details click ok and delete.

Type in new No. and tab

Type in service, example front brakes, tab to big area don't worry about group.

Type in full description, and then save

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 and controls:

- A dropdown menu for "Code" with a search icon.
- Text boxes for "Surname", "Given Names", and "Title".
- Text boxes for "Address" and "Pcode".
- Text boxes for "Phone1", "Phone2", and "Mobile".
- A text box for "Email".
- A dropdown menu for "Code:" and a text box for "Description:". To the right is a checked checkbox for "Direct Mail".
- Text boxes for "Last Date" and "Account".

Click on CUSTOMER

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, tab to **code:** click on drop down box and choose, click

At end click save, click yes to save

To change Account customers details

Account Customer Maintenance

Account ID: [1] [...]

Description: KEDRON MECHANICAL SERVICES

Contact 1: LANCE JAGGER

Active:

Dued: \$0.00

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

Group: [1] Description: WORKSHDP TRADE

Price: \$0.00

Credit Limit: []

A.B.N.: []

Last Payment Date: 06/09/1999

Open Item: Wholesale:

90 Days+: \$0.00 60 Days: \$0.00 30 Days: \$0.00 Current: \$0.00 Total: \$0.00

- Click on Customer
- 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, 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" with a blue title bar. The window contains several input fields and checkboxes. At the top, there is a "Part" field with a dropdown arrow, an "Active" checkbox (checked), and a "Change Group" button. Below this are "Group" and "Group Description" fields, with "Retail without GST" and "Retail with GST" fields below them, both showing "\$0.00". A "Descriptions" field is on the right. A tabbed interface at the bottom has tabs for "General", "Pricing", "Alternates", "Makeup Parts" (selected), "Transactions", and "Notes". The "Makeup Parts" tab contains fields for "Bin" (10), "Bin Name" (NON STOCK ITEMS), "Preferred Supplier" (1), "Supplier Name" (AUSSIE EXHAUST & REPAIRS), "Type" (Normal Part), "Sales Units" (1), "Issue" (EACH), "Min Resorder", "Max Resorder", "Usage Category", "GST Exempt" (unchecked), "Serial No Tracking" (unchecked), "Auto Calc" (checked), "Discount Flag" (checked), "Labour Hours/Min", "Qty On Hand" (\$0.00), "Value On Hand", "Qty On Purchase Order" (//), and "Last Changed".

Click on stock

Click on stock maintenance

Clear all if part comes up

To make up a new part

Type in part number and tab, click on drop down and choose group, click

OK

Tab all the way through to alternates and then type in costs and retail prices

Exit out to save

Account Customers Payment

Account Customer Maintenance

Account ID: [] Descr: CALTEX S/S EAGLE FARM [] Active

Contact 1: RV & LN NOMINEES PTY LTD [] Owed: \$0.00

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

Payment [v]
Type

Amount [] Gst [] GL Code []

Reference [] GL Narrative []

Details [] Payment [] Post []

Click on Customer

Click on 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 detail #.

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 #, Rego,

Click on payment

Click on new

Click on drop down box, choose which method of payment

Click ok, Click close, Click post

Either **auto select** or **tick** the invoice you want to pay off

Click OK

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 Services :	
	23 ↓	%	11 ↓	%	0 ↓	%	3 ↓	%	33 ↓	%
Part Sales :	3586.36	81.9	846.40	45.5	0.00	0.0	0.00	0.0	436.56	55.1
Labour :	794.00	18.1	817.00	43.8	0.00	0.0	0.00	0.0	357.00	44.9
Service Charges :	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
Total	4382.36		1863.40		0.00		209.85		796.56	
Discount On Retail	-763.08	-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 Charges :	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
Total	0.00		0.00		0.00		40.00		7291.17	
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	6.74	16.9	1732.14	26.7
Gross Profit	0.00	0.0	0.00	0.0	0.00	0.0	33.26	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 customer

Click on reprint invoice

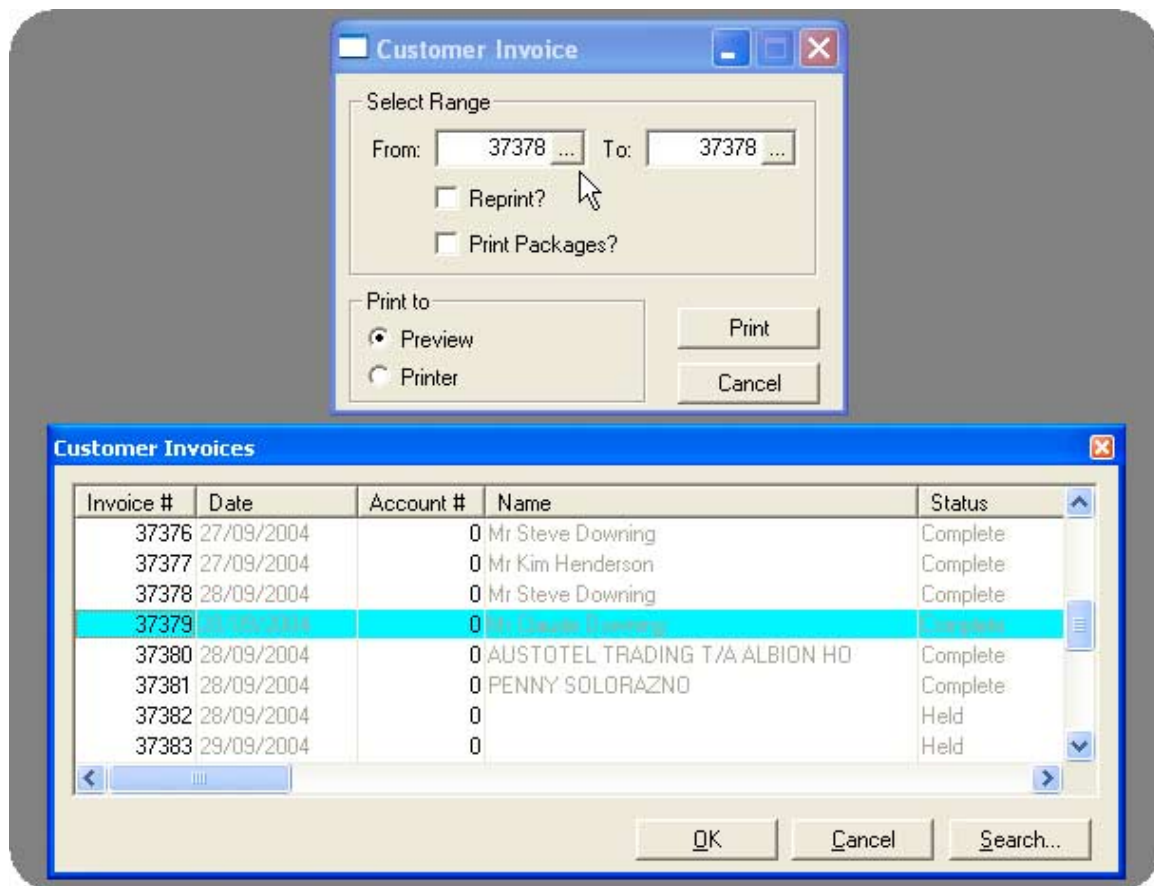
Click on tab box in from: arrow up or down to date or invoice

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 customer

Click on reprint Quote

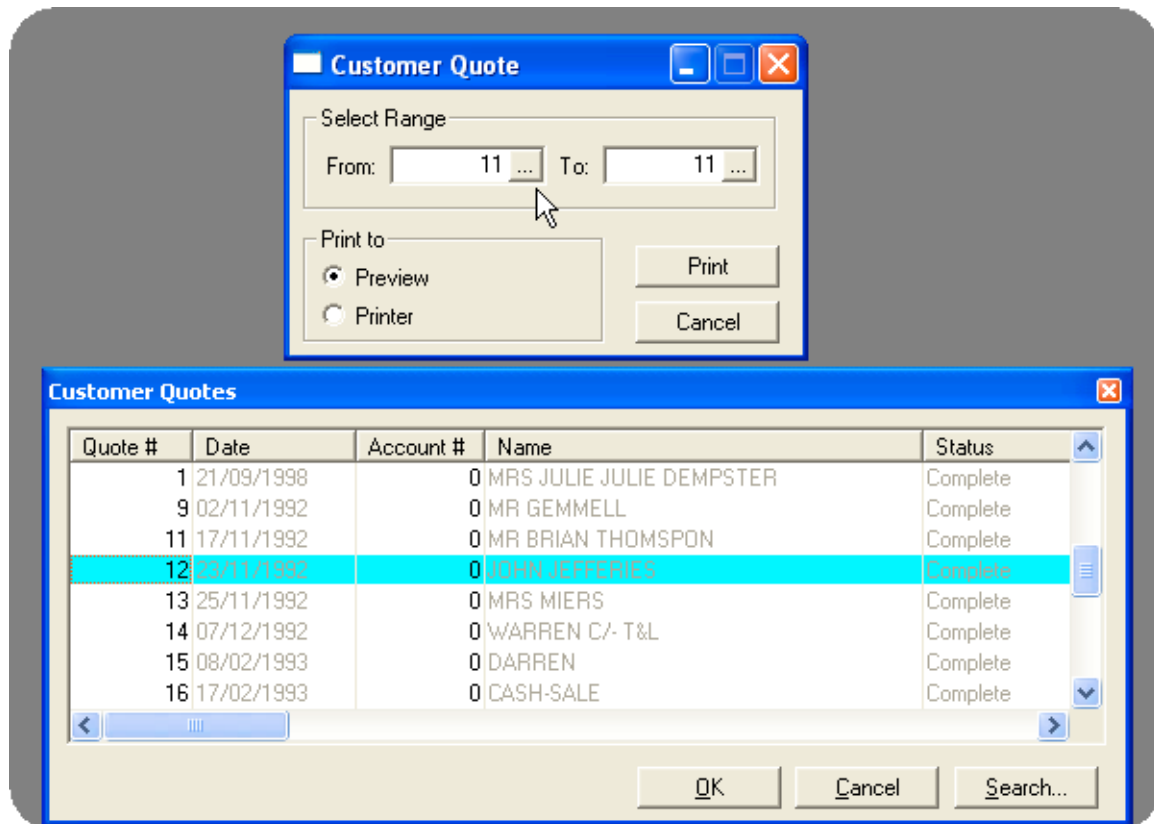
Click on tab box in from: arrow up or down to date or invoice

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 customer

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

Adding new Account Customers

Account Customer Maintenance

Account ID: [] Descript: [] Active

Contact 1 [] Owed: \$0.00

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

Business Address: Street/Suburb/State Post Code

Mailing Address: Street/Suburb/State Post Code

Contact 1 [] Phone 1 [] Phone 2 [] Phone 3 []

Contact 2 [] Retail Code [] New Retail

Email [] Associated Retail Name []

Click on customer

Click on Account customer maintenance

Click in Descript: type in new Acc.customers name

Tab through to Group click on drop down box and choose which one you want then click OK

Tab through to Contact Information, then tab through and add details.

When you get to the **New Retail Button** make sure you click on this, then exit and click on yes to save