



Introduction



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Workshop Plug Ins

The Workshop Plug Ins is design

for the purpose of maintain vehicle information, enter vehicle information

under sales document.

There are few additional feature

like Image Search, Incentive Point added in this Plug Ins.

We hope this help file serves

its purpose as an useful reference.

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Debtor Maintenance

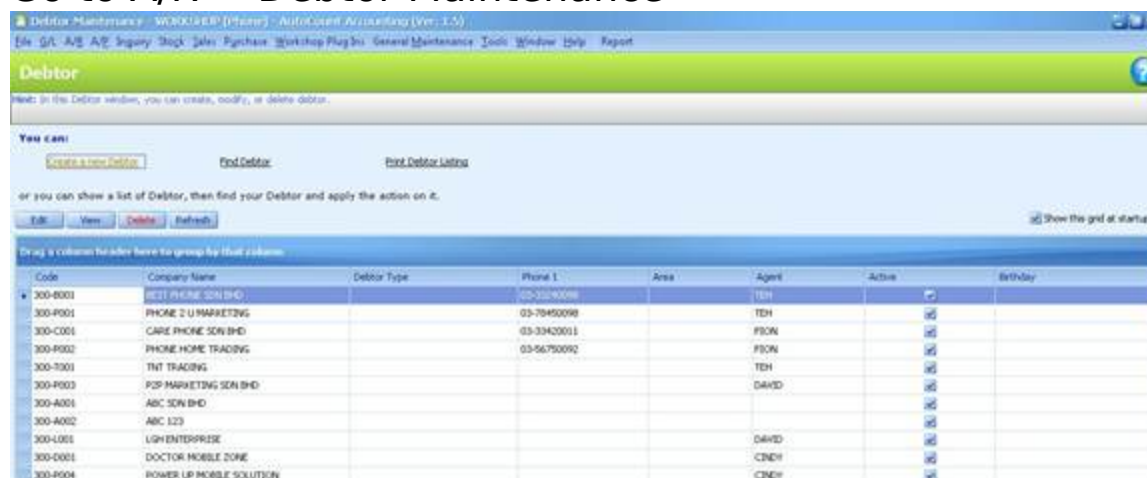
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DEBTOR

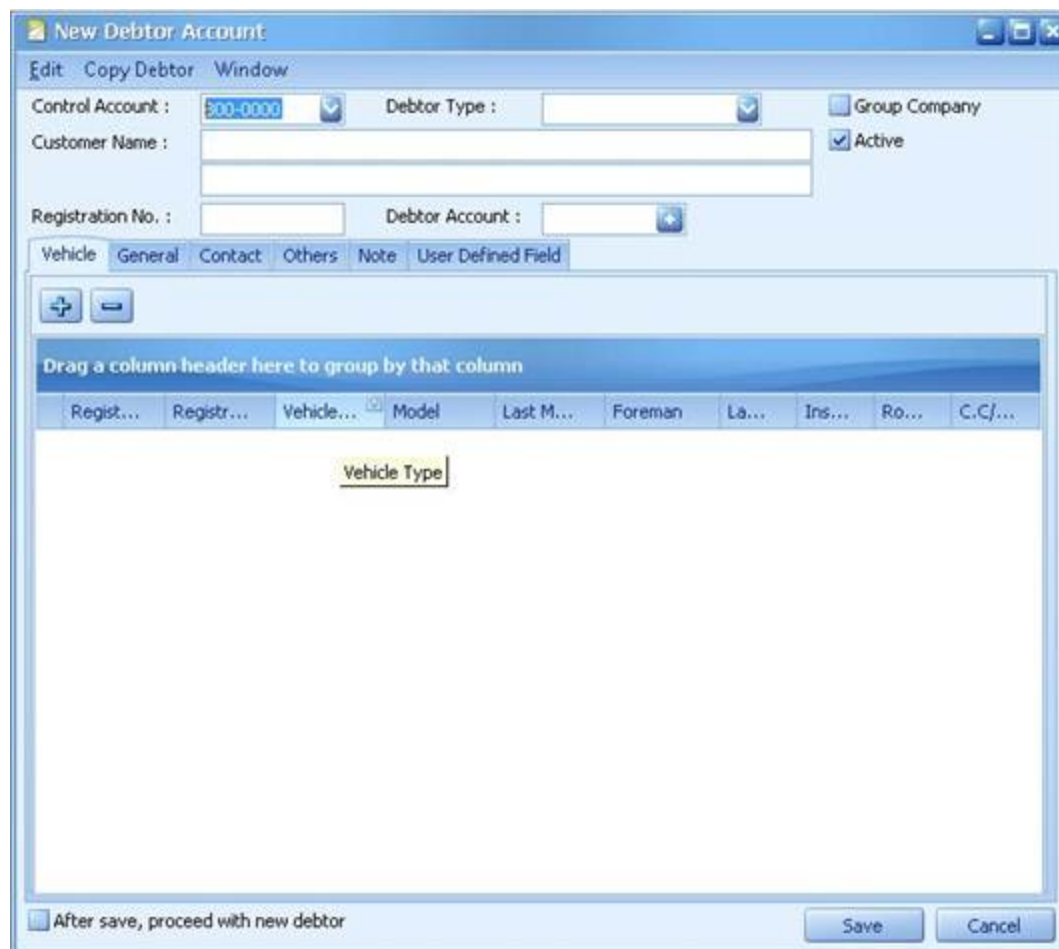
MAINTENANCE

This is to maintain vehicle information. Debtor can be determined as personal or company, each of them can have more than 1 vehicle information in their debtor maintenance.

Go to A/R > Debtor Maintenance



Click on [Create a new Debtor](#) to create a new debtor



Control Number: Choose the control number for this debtor

Debtor Type: Select a debtor type (for report filtering purpose). Debtor Type is maintained at General Maintenance > Debtor Type Maintenance

Group Company: Can be used as control account, to check or uncheck

normal; MARGIN: 5pt 0cm 0pt; TEXT-AUTOSPACE: ; mso-layout-grid-align: none">**Customer Name:** Key in the personal or company name of this debtor

normal; MARGIN: 5pt 0cm 0pt; TEXT-AUTOSPACE: ; mso-layout-grid-align: none">**Registration No:** Key in the company's registration number if there is any, otherwise blank

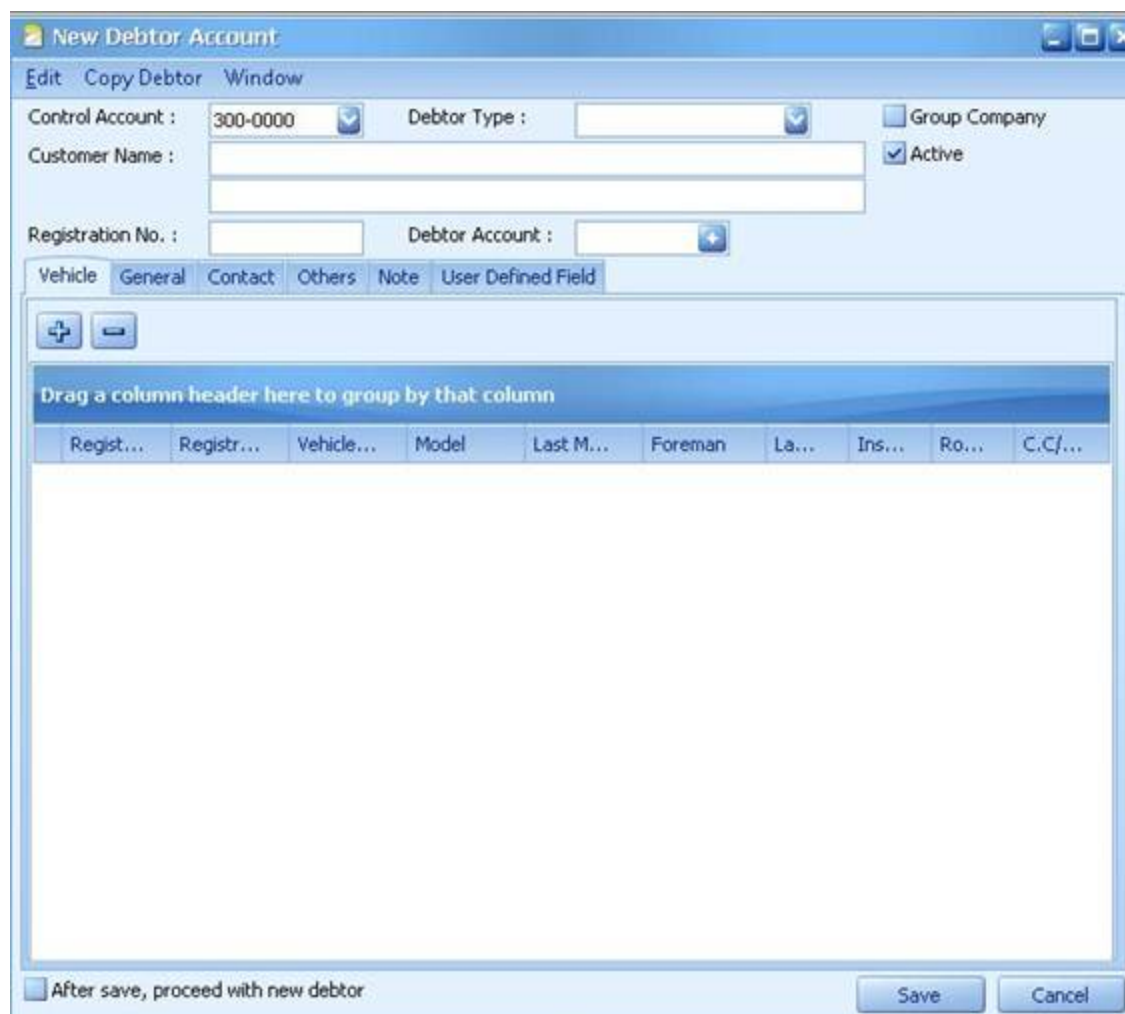
Debtor Account: You may key in the account number for this debtor; OR

click on '+' sign to auto generate debtor number; the format of debtor account number is set at Tools > Options > General > Account Code Format.


Active: Means this debtor is allowed for transaction

normal; MARGIN: 5pt 0cm 0pt; TEXT-AUTOSPACE: ; mso-layout-grid-align: none">

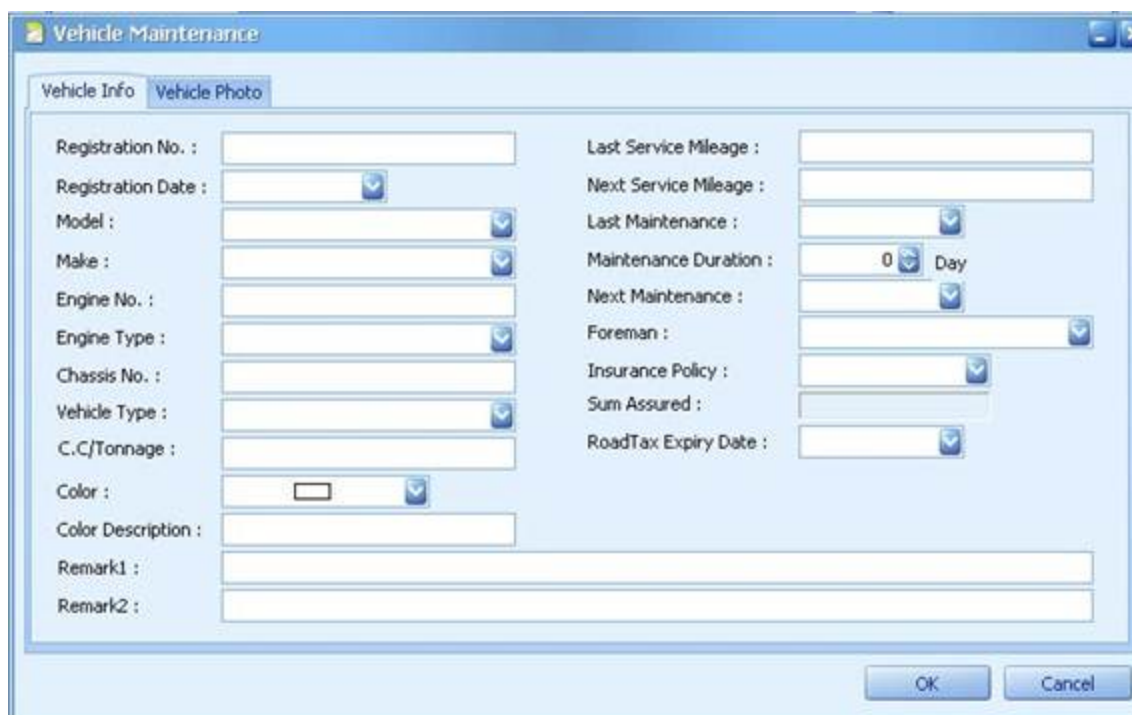
Vehicle Maintenance



Click on  Button to add new vehicle maintenance

normal; MARGIN: 5pt 0cm; TEXT-AUTOSPACE: ; mso-layout-grid-align: none">Click on  Button to delete vehicle maintenance

normal; MARGIN: 5pt 0cm; TEXT-AUTOSPACE: ; mso-layout-grid-align: none">Double Click on the vehicle to edit.



There are 2 Tab Pages on this vehicle maintenance: Vehicle Info and Vehicle Photo

1st Tab Page: Vehicle Info

Registration Number: Key in vehicle's registration number

Registration Date: Key in vehicle's registration date

Model: Key in vehicle's model

Make: Key in vehicle's year of make

Engine No: Key in vehicle's engine number

Engine Type: Key in vehicle's engine type

Chassis No: Key in vehicle's identification number

Vehicle Type: Key in vehicle's type

C.C/Tonnage: Key in vehicle's C.C/Tonnage

Colour: Choose vehicle's colour from colour chart

Colour Description: Key in vehicle's colour description
(Choose from custom, web, system)

normal; MARGIN: 5pt 0cm; TEXT-AUTOSPACE: ; mso-layout-grid-align: none">**Remark 1:** Put in your remark if any

normal; MARGIN: 5pt 0cm; TEXT-AUTOSPACE: ; mso-layout-grid-align: none">**Remark 2:** Put in your additional remark if any

Last Service Mileage: Key in last service mileage

Next Service Mileage: Key in next service mileage, can choose either monitor by mileage or date, whichever come first

normal; MARGIN: 5pt 0cm; TEXT-AUTOSPACE: ; mso-layout-grid-align: none">**Last Maintenance:** Key in last maintenance date

Maintenance Duration: Key in maintenance duration period, in how many days

Next Maintenance: Key in next maintenance date, can choose either monitor by mileage or date, whichever come first

Foreman: Select foreman from the list.

Foreman is maintain at Workshop Plug Ins >

Foreman Maintenance

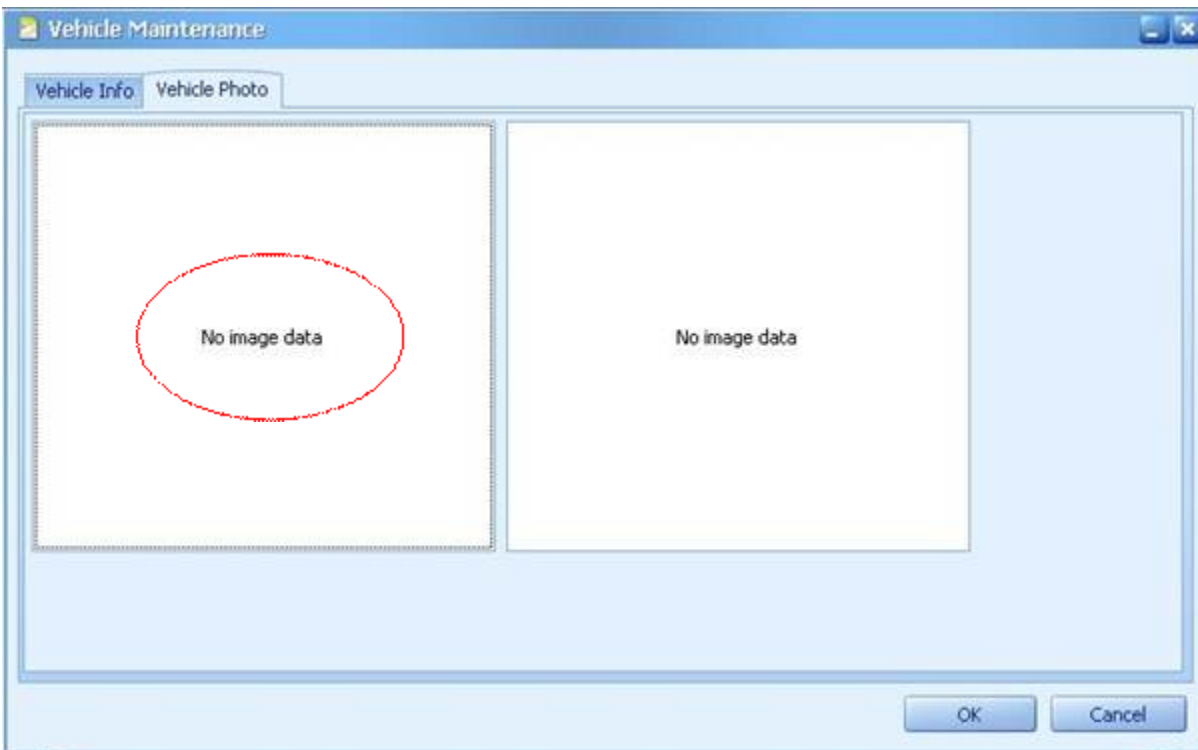
Insurance Policy: Select insurance policy from the list.
Insurance Policy is maintain at

normal; MARGIN: 5pt 0cm; TEXT-AUTOSPACE: ; mso-layout-grid-align: none">Workshop Plug Ins > Insurance Policy Maintenance

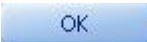
normal; MARGIN: 5pt 0cm; TEXT-AUTOSPACE: ; mso-layout-grid-align: none">**Sum Assured:** Load from Insurance Policy maintenance

Road Tax Expiry Date: Key in vehicle's road tax expiry date

2nd Tab Page: Vehicle Photo



Right click on “No Image Data”, load picture from your desktop or folder. Picture is not a necessary, can leave it blank if do not have any vehicle's image to maintain. Can upload up to 2 images per vehicle.

Once complete key in vehicle info and uploaded image, click  to exit.

Stock Item Maintenance

Navigation: New Help > [Workshop PlugIns](#) >

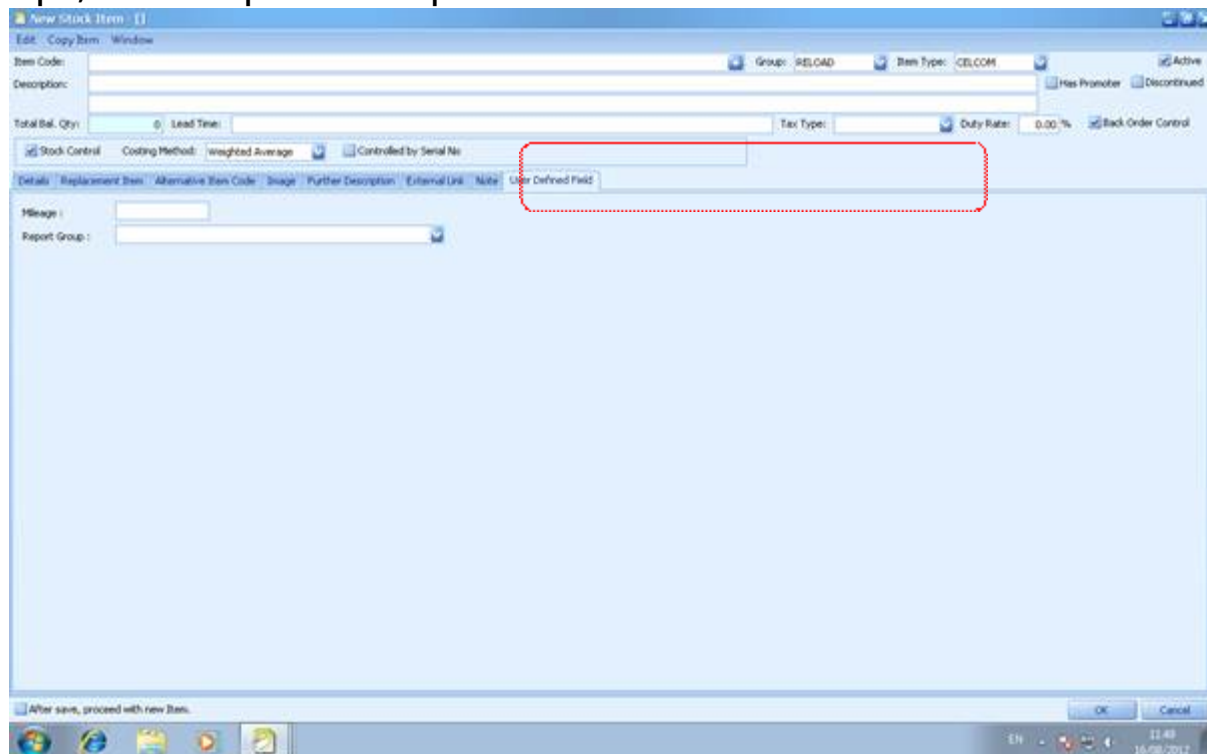
STOCK ITEM

MAINTENANCE

Go to Stock > Stock Item Maintenance

Opt; tab-stops: 200.1pt">Click on  to create a new item stock item

Opt; tab-stops: 200.1pt">

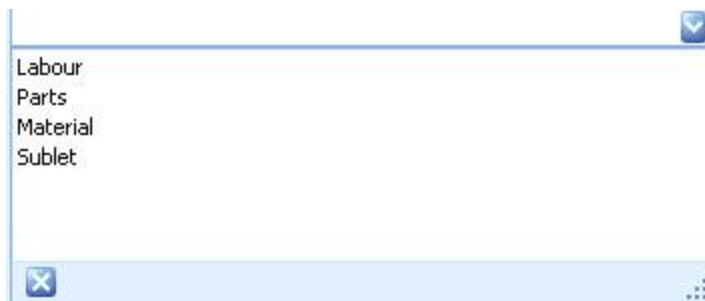


Mileage: This is use for auto calculation of next service mileage, so when key in sales invoice or cash sale, the mileage will be auto calculated.

Report Group: Predefine Group for user to select for Incentive calculation grouping

Opt; tab-stops: 200.1pt">

Can scroll down to choose which report group:-

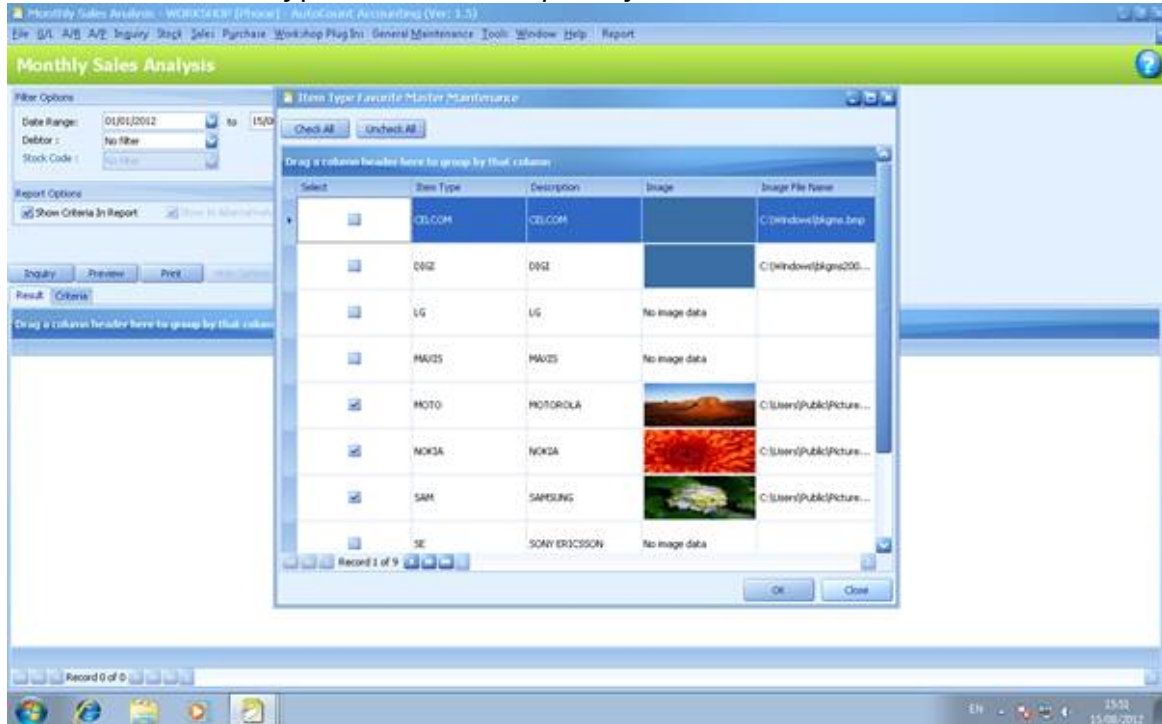


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WORKSHOP PLUG INS

1) Item Type Favorite Maintenance

Go to Workshop Plug Ins > Item Type Favorite Maintenance
Check those Item Type that used frequently.

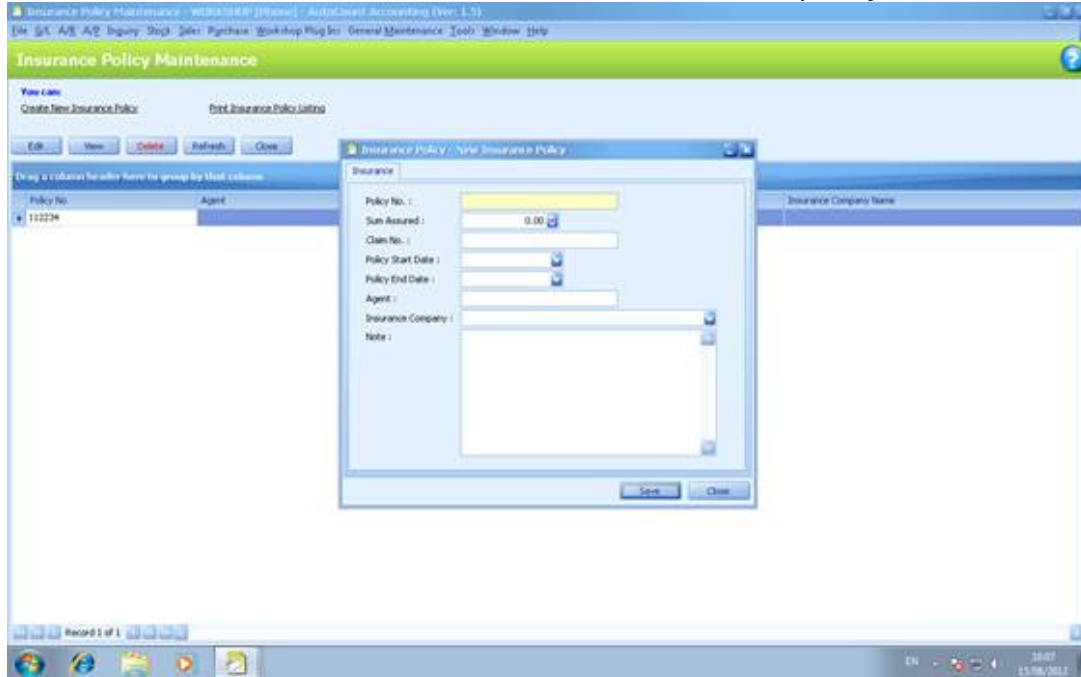


feature of this will be explained under another topic – Image Search

2) Insurance Policy

Go to Workshop Plug Ins > Insurance Policy

Click on Create New Insurance Policy to create a new insurance policy



Click Print Insurance Policy Listing to print insurance policy listing

3) Foreman Maintenance

Go to Workshop Plug Ins > Foreman Maintenance

This is for you to maintain workshop's foreman particulars and to also update for incentive given and working activation in the workshop



Foreman: Key in foreman code

Description: Key in foreman name

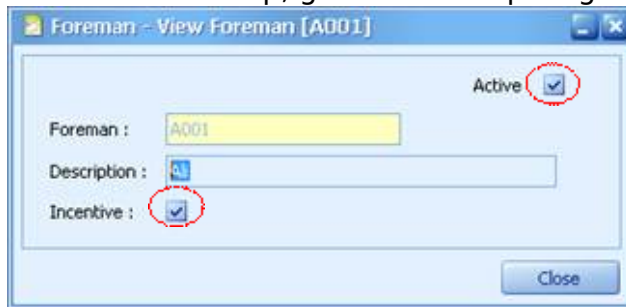
Incentive: ☒ Check if incentive is given to this foreman Active: ☒ Check if this foreman still working with the workshop

4) - Sales Agent / Foreman Sales Incentive Point Maintenance

Go to Workshop Plug Ins > Sales Agent / Foreman Sales Incentive Point Maintenance

This allow you to set incentive point for your sales agent / foreman. First of all, need to make sure foreman / sales agent maintenance is done.

For Foreman Setup, go to Workshop Plug Ins > Foreman Maintenance



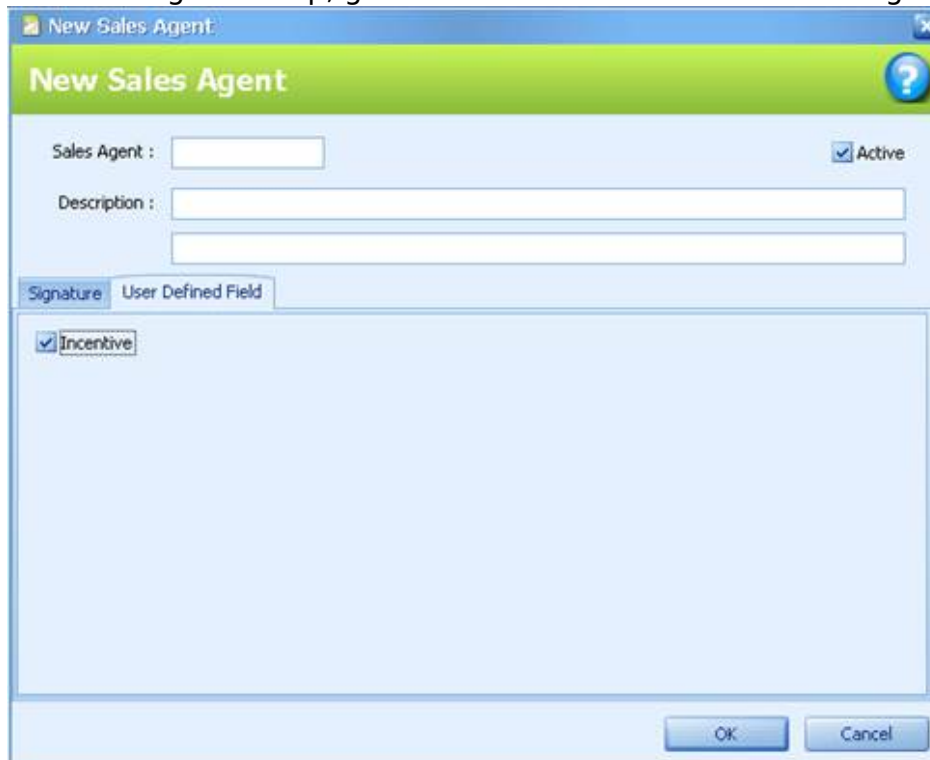
Foreman: Key in foreman code

Description: Key in foreman name

Check on ☒ Active Button to activate the foreman in the workshop

Check on ☒ Incentive Button to activate the incentive point for this foreman

For Sales Agent Setup, go to General Maintenance > Sales Agent Maintenance

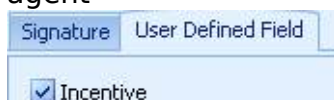


Sales Agent: Key in Sales Agent Code

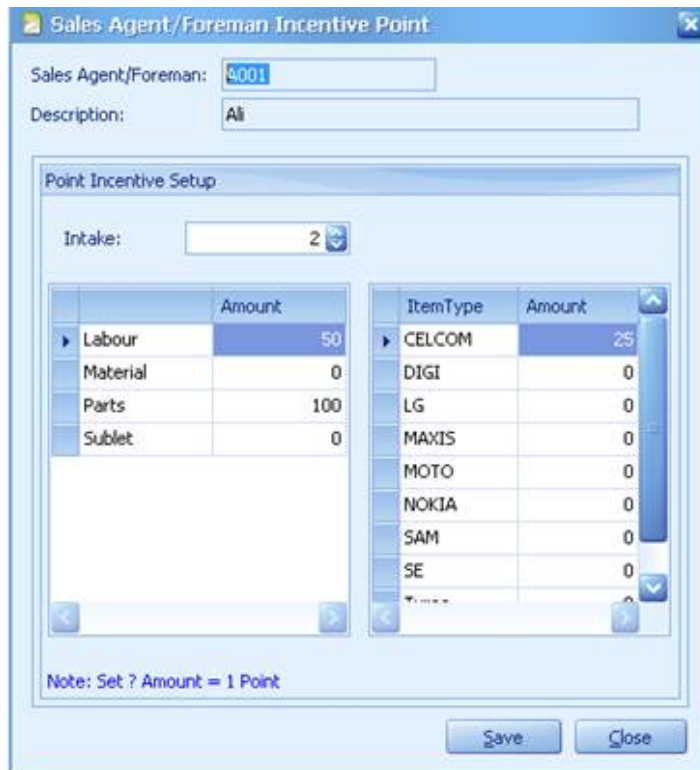
Description: Key in Sales Agent Name

Check on ☒ Active Button to activate the sales agent in the workshop

User Defined Field: Check ☒ Incentive to activate the incentive point for this sales agent



Update on sales agent / foreman incentive point, explained as below:



Sales Agent / Foreman: Key in Sales Agent / Foreman Code

Description: Key in Sales Agent / Foreman Name

Point Incentive Setup:

Individual setting of incentive point for sales agent/ foreman.

Intake: Means to determine how many transaction / invoice generated by that particular sales agent / foreman, to be equivalent to 1 incentive point
For example: Every 3 transaction/invoice generated = 1 incentive point

Point Incentive Setup by category, either report group or item type.
Enter the Amount on either Report Group /Item Type.

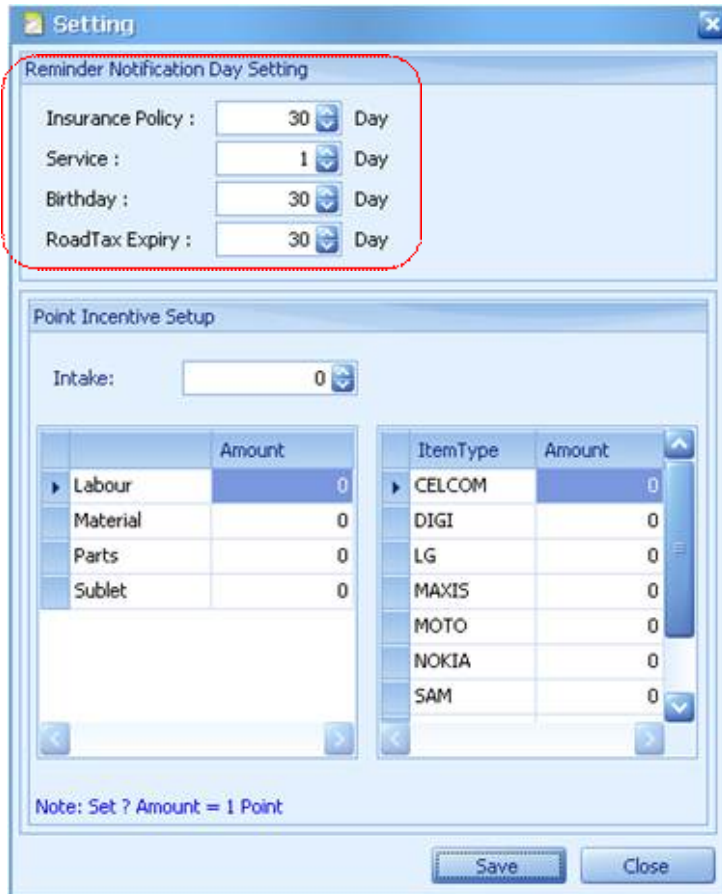
Amount will be in MYR, so need to set ? Amount = 1 Point.

Example: Report Group > Labour > RM50 – Means within a period, cash sales and invoice have at least total of RM50 for foreman A001 for items under Report Group [Labour], he/she will have 1 point.

5) - Setting

Go to Workshop Plug Ins > Setting

This setting allow you to set reminder notification by day setting.



Setting

Reminder Notification Day Setting

Insurance Policy : 30 Day

Service : 1 Day

Birthday : 30 Day

RoadTax Expiry : 30 Day

Point Incentive Setup

Intake: 0

| | Amount |
|----------|--------|
| Labour | 0 |
| Material | 0 |
| Parts | 0 |
| Sublet | 0 |

| Item Type | Amount |
|-----------|--------|
| CELCOM | 0 |
| DIGI | 0 |
| LG | 0 |
| MAXIS | 0 |
| MOTO | 0 |
| NOKIA | 0 |
| SAM | 0 |

Note: Set ? Amount = 1 Point

Save Close

Insurance Policy: Key in how many days in advance for reminder

Service Key in how many days in advance for reminder

Birthday: Key in how many days in advance for reminder

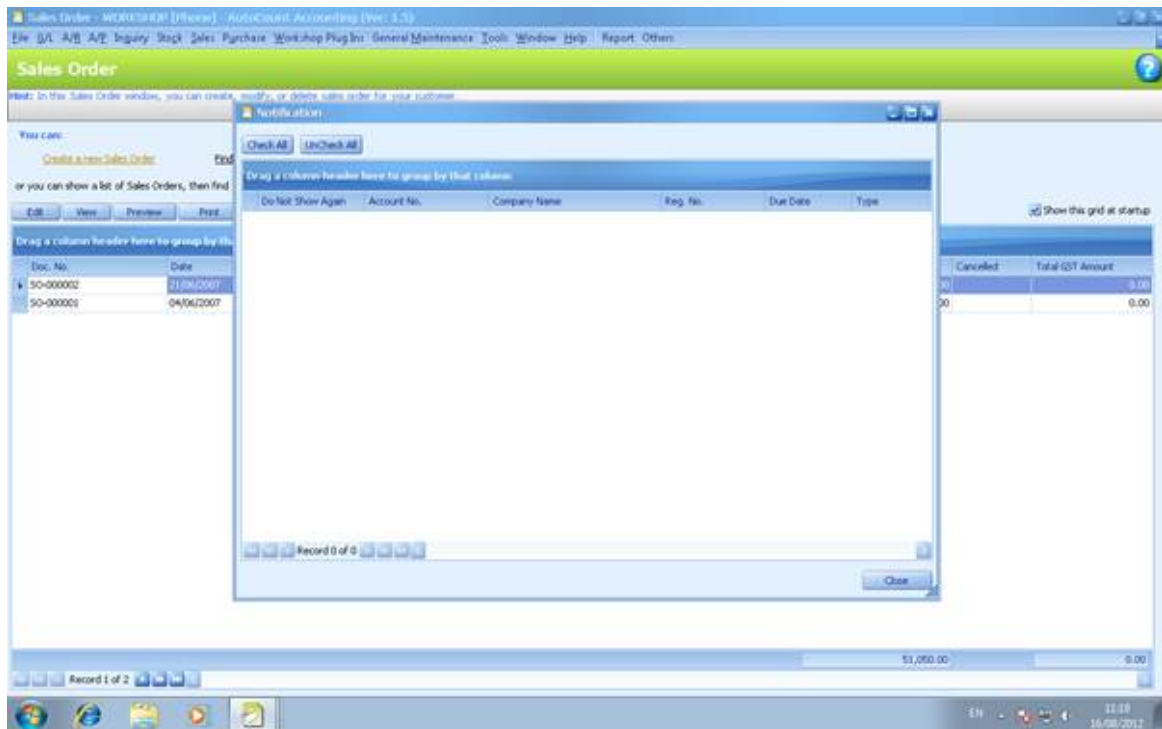
Road Tax Expiry: Key in how many days in advance for reminder

Point Incentive Setup: A global setting of incentive point for all sales agent/foreman.

6) - Reminder

Go to Workshop Plug Ins > Reminder

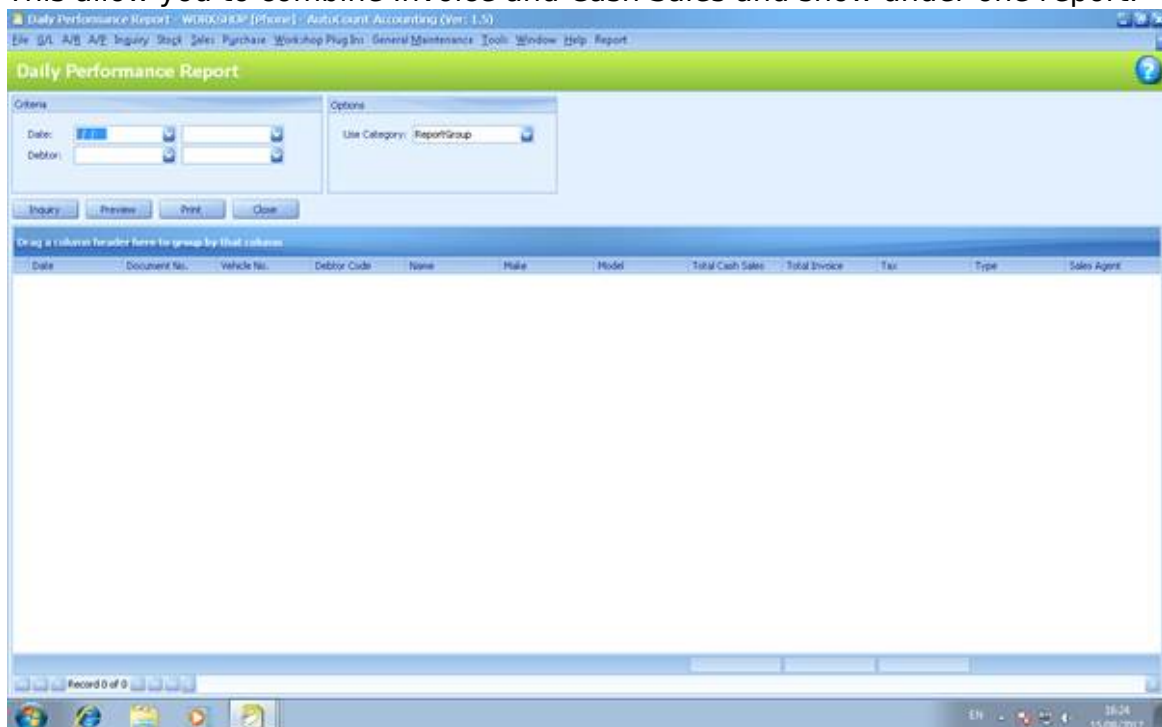
System will list down all the reminders that set earlier, in order for workshop to send reminder to customer.



7) - **Daily Performance Report**

Go to Workshop Plug Ins > Daily Performance Report

This allow you to combine Invoice and Cash Sales and show under one report.



Under criteria:-

Date: Select date that you wish to see the report

Debtor: Select by debtor that you wish to see the report

Under Options:

Use category as Report Group or Item Type (Both of these will be keyed in at Invoice or Cash Sales)

Daily Performance Report Sample

WORKSHOP

| Daily Performance Report | | | | | | | | | | | Page: 1/2 | |
|--------------------------|-----------|----------|-----------------------|------|-------|--------|---------|----------|--------|-----------|----------------|-----------------|
| Date | Doc No. | Reg. No. | Debtor | Make | Model | Labour | S.Parts | Material | Sublet | Tax | Total C. Sales | Total IV. Sales |
| 18/01/2007 | CS-000001 | wcv 3457 | BEST PHONE SDN BHD | 1999 | WIRA | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.00 |
| 18/01/2007 | I-000001 | wcv 3457 | BEST PHONE SDN BHD | 1999 | WIRA | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 3930.0000 | 0.00 | 3930.0000 |
| Group Total : | | | | | | 0.00 | 0.00 | 0.00 | 0.00 | 3,930.00 | 0.00 | 3,930.00 |
| 21/02/2007 | I-000002 | | CARE PHONE SDN BHD | | | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.00 | 0.0000 |
| Group Total : | | | | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 20/03/2007 | I-000003 | | BEST PHONE SDN BHD | | | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.00 | 0.0000 |
| Group Total : | | | | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 10/04/2007 | I-000004 | | BEST PHONE SDN BHD | | | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.00 | 0.0000 |
| Group Total : | | | | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 20/04/2007 | I-000005 | | DOCTOR MOBILE ZONE | | | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.00 | 0.0000 |
| Group Total : | | | | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 16/05/2007 | I-000006 | | P2P MARKETING SDN BHD | | | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.00 | 0.0000 |
| Group Total : | | | | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 05/06/2007 | I-000007 | | P2P MARKETING SDN BHD | | | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.00 | 0.0000 |
| Group Total : | | | | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 18/06/2007 | I-000009 | | PHONE HOME TRADING | | | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.00 | 0.0000 |
| Group Total : | | | | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 19/06/2007 | I-000008 | | BEST PHONE SDN BHD | | | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.00 | 0.0000 |
| Group Total : | | | | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

8) - Incentive Point Report

Go to Workshop Plug Ins > Incentive Point Report

This allow you to enquiry, preview and print incentive report by setting

Incentive Point Report - WCR003-KB (Phone) - AutoCount Accounting (Ver: 3.5)

Report

Incentive Point Report

Criteria

Date:

Sales Agent:

Foreman:

Options

Use Category:

Inquiry Preview Print Close

Drag a column header here to group by that column

| Date | Agent | Agent Type |
|------------|-------|------------|
| 18/01/2007 | TEH | SalesAgent |
| 20/03/2007 | TEH | SalesAgent |
| 10/04/2007 | TEH | SalesAgent |
| 19/06/2007 | TEH | SalesAgent |

Record 1 of 4

17:26 15/06/2012

Under criteria:-

Date: Select date that you wish to see the report

Debtor: Select by debtor that you wish to see the report

Under Options:

Use category as Report Group or Item Type (Both of these will be keyed in at Invoice or Cash Sales)

Incentive Point Report Sample

WORKSHOP

SUMMARY OF PERFORMANCE INCENTIVE

FOR **TEH**
MONTH January 2007

| | | | TOTAL SALES | | | | | | TOTAL |
|------|--------|-------|-------------|-------|-----|-------|------|-------|-------|
| DATE | INTAKE | POINT | PARTS | POINT | LUB | POINT | ACC. | POINT | POINT |
| 18 | 2 | 0 | 0.0000 | 0 | | | | | 0 |
| 20 | 1 | 0 | 0.0000 | 0 | | | | | 0 |
| 10 | 1 | 0 | 0.0000 | 0 | | | | | 0 |
| 19 | 1 | 0 | 0.0000 | 0 | | | | | 0 |
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SALES

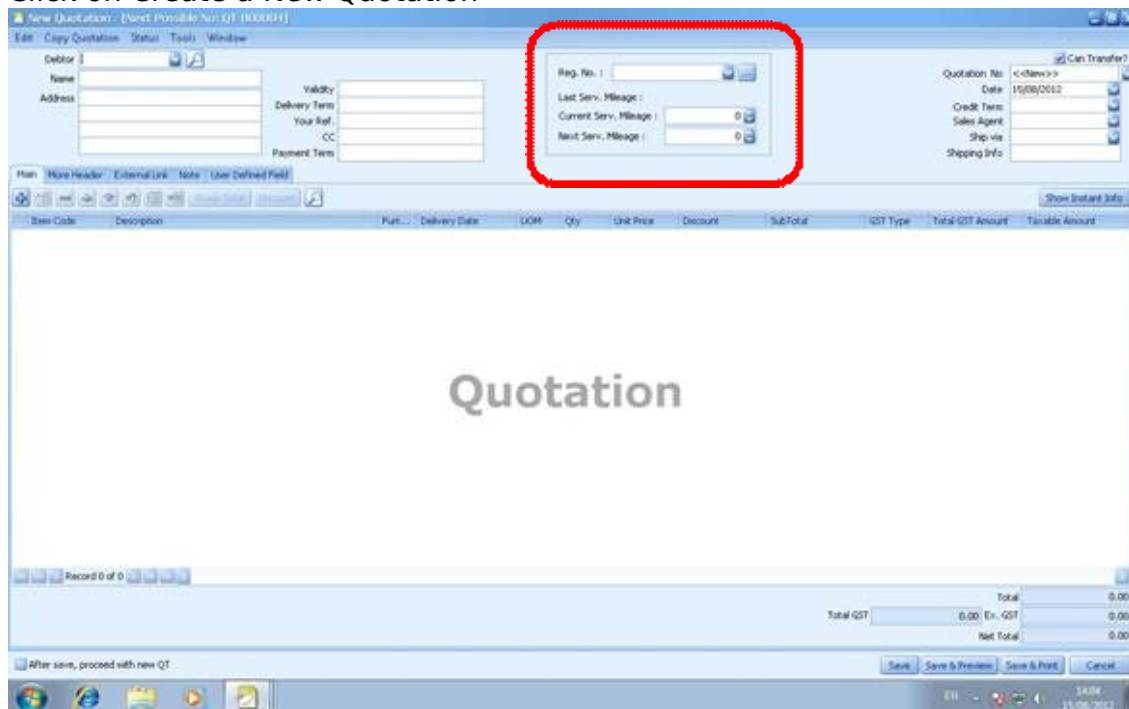
Sales allowed you to do your sales transaction / activities by creating quotation, sales order, invoice, cash sales, generating sales report and etc. Further explanation as below:

1) - Quotation

This is to create, edit or print quotation for customer's confirmation whether to repair or not

Go to Sales > Quotation

Click on Create a New Quotation



Debtor: Select from debtor maintenance, can click  Button to car search

Reg No: Select from debtor maintenance, under vehicle maintenance

Last service mileage: Auto load when you select debtor from the list

Current service mileage: To key in current service mileage

Next service mileage: To key in next service mileage

2) - Sales Order

This is to create, edit or print sales order when customer confirmed to repair their vehicle.

Go to Sales > Sales Order

Click on  Button to Create a New Sales Order

- Reg No:** Select from debtor maintenance, under vehicle maintenance
- Foreman:** Select foreman from the list. Foreman is maintained at Workshop Plug Ins > Foreman Maintenance
- Last service mileage:** Auto load when you select specific vehicle from debtor maintenance
- Current service mileage:** To key in current service mileage
- Next service mileage:** To key in next service mileage
- Chassis No:** Auto load when you select specific vehicle from debtor maintenance
- Make & Model:** Auto load when you select specific vehicle from debtor maintenance
- Last service date:** Auto load when you select specific vehicle from debtor maintenance
- Current service date:** To key in current service date
- Service duration:** To key in service duration, in how many days
- Next service date:** To key in next service date
- Engine No:** It will load the chassis number from master

Click [More Info](#) Button to edit more information as below:

- Supervisor: Select from the debtor maintenance list
- Reg. Time: Key in the registration time for repair
- Target Time: Key in targeted time of completion
- Time Com: Key in the actual time of completion

3) - Invoice

This is to create, edit or print invoice when customer confirmed to repair their vehicle. And to issue Invoice for billing and payment purposes.

Go to Sales > Invoice

Click on [Create a new Invoice](#) Button to Create a New Invoice

There are 2 Tab Pages under Invoice, which is Service and Insurance

1st Tab Page: Service

Reg No: Select from debtor maintenance, under vehicle maintenance

Foreman: Select foreman from the list. Foreman is maintained at Workshop Plug Ins > Foreman Maintenance

Last service mileage: Auto load when you select specific vehicle from debtor maintenance

Current service mileage: To key in current service mileage

Next service mileage: To key in next service mileage

Chassis No: Auto load when you select specific vehicle from debtor maintenance

Make & Model: Auto load when you select specific vehicle from debtor maintenance

Last service date: Auto load when you select specific vehicle from debtor maintenance

Current service date: To key in current service date

Service duration: To key in service duration, in how many days

Next service date: To key in next service date

Engine No: Auto load when you select specific vehicle from debtor maintenance

Check for Current Serv. Mileage and Next Serv. Date so that system will update from current service mileage and date to debtor maintenance, must click!

2nd Tab Page: Insurance

Insurance Policy: Select insurance policy from the list. Insurance Policy is maintained at

Workshop Plug Ins > Insurance Policy Maintenance

Click [More Info](#) Button to edit more information as below:

Supervisor: Select from the debtor maintenance list

Reg. Time: Key in the registration time for repair
Target Time: Key in targeted time of completion
Time Com: Key in the actual time of completion

Invoice have this special feature **New** Button, normally to be used for new walk in customer which not being registered in debtor maintenance before, so staff can use this feature to simply key in first their registration number and insurance policy first, then only update later on with full details on debtor maintenance.

Check for Insurance Policy so that system will update from insurance policy to debtor maintenance, must click!

4) - Cash Sales

Basically, Cash Sales have very similar features with Invoice. Only different is, cash sales allow multi payment / cash payment / credit card payment.



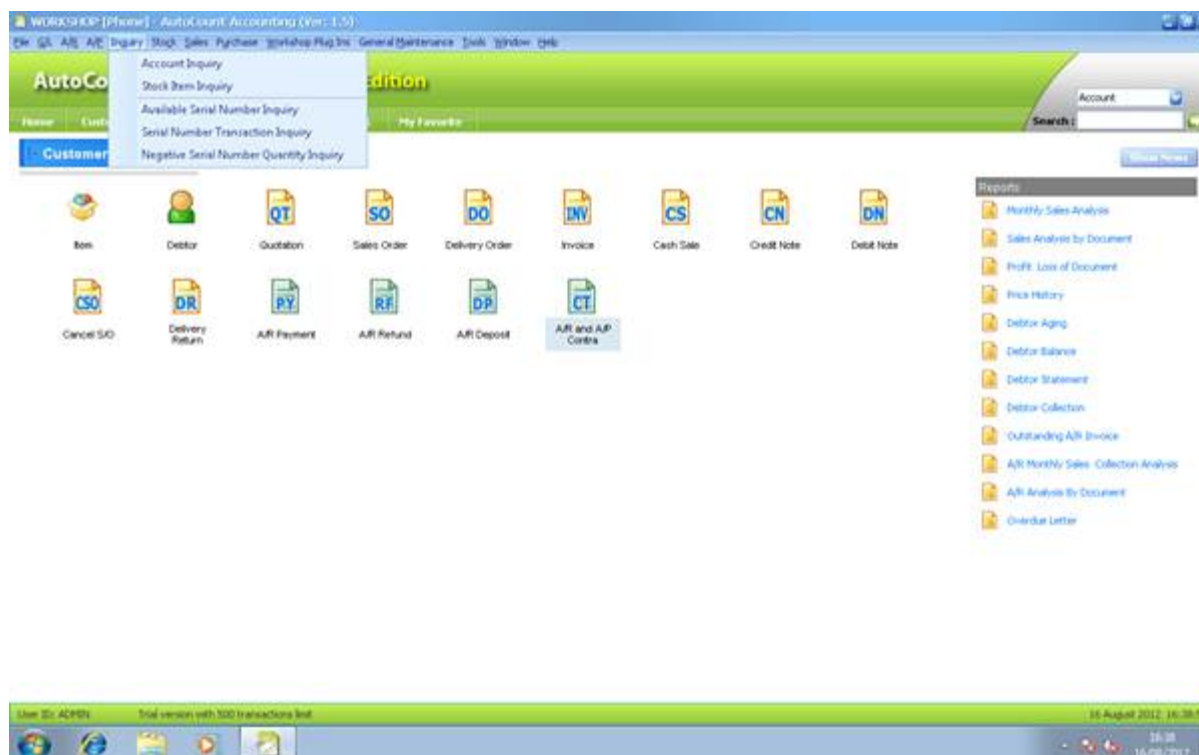
Navigation: [New Help](#) > [Workshop PlugIns](#) >

ACCOUNT INQUIRY

Account Inquiry - Allow you to check the price history and car list under account / debtor

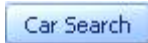
Go to

Inquiry > Account Inquiry



Key in  button under Account to search for account, Account here actually means Debtor



Click on  button to search for the car list under this account / debtor

Car Search

Registration No. :

Drag a column header here to group by that column

| Registration No. | Customer Code | Name | Last Service MI... | Last Maintenance | Next Maintena... | Foreman | Maintenance Du... |
|------------------|---------------|--------------------|--------------------|------------------|------------------|---------|-------------------|
| AAA | 300-A002 | ABC 123 | | | | | |
| sdf 789 | 300-A001 | ABC SDN BHD | 0 | 24/07/2012 | 24/07/2012 | | 0 |
| WCV 1234 | 300-A001 | ABC SDN BHD | | | | | 0 |
| wcv 3457 | 300-B001 | BEST PHONE SDN ... | 0 | 24/07/2012 | 31/07/2012 | | 30 |

OK Cancel

Once

selected the car, the vehicle number will be show here

Price History.

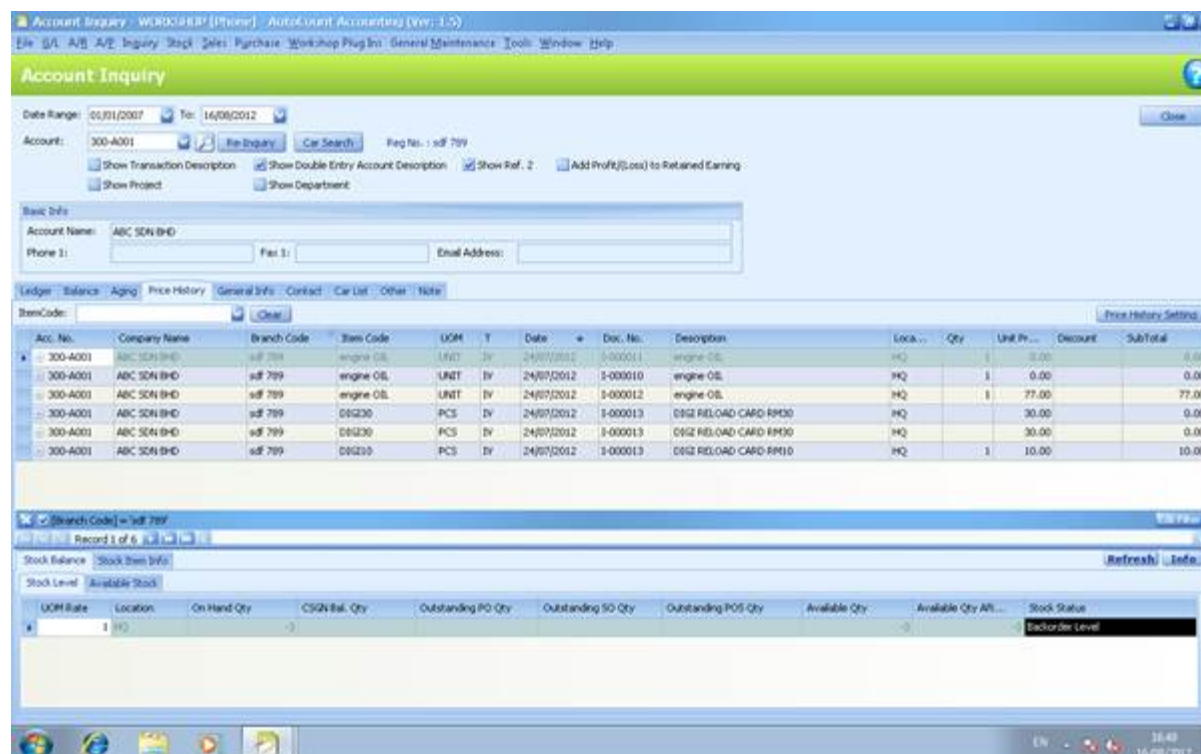
This feature

allow you to check the repair / service history of the vehicle selected, by

item code

Branch Code

> Means Vehicle Car Number



The screenshot shows the 'Account Inquiry' window for account 300-A001. The 'Date Range' is set from 05/01/2007 to 14/09/2012. The 'Account' field is 300-A001. The 'Branch Code' is sdf 789. The 'Item Code' is 000001. The 'Description' is engine OIL. The 'Lock' status is HQ. The 'Qty' is 1. The 'Unit Price' is 0.00. The 'Discount' is 0.00. The 'SubTotal' is 0.00. The 'Stock Balance' is 0.00. The 'Stock Item Info' is displayed below the table.

| Acc. No. | Company Name | Branch Code | Item Code | UOM | T | Date | Doc. No. | Description | Lock... | Qty | Unit Pr... | Discount | SubTotal |
|----------|--------------|-------------|------------|------|----|------------|----------|-----------------------|---------|-----|------------|----------|----------|
| 300-A001 | ABC SDN BHD | sdf 789 | engine OIL | UNIT | IV | 24/07/2012 | 1-000011 | engine OIL | HQ | 1 | 0.00 | | 0.00 |
| 300-A001 | ABC SDN BHD | sdf 789 | engine OIL | UNIT | IV | 24/07/2012 | 1-000010 | engine OIL | HQ | 1 | 0.00 | | 0.00 |
| 300-A001 | ABC SDN BHD | sdf 789 | engine OIL | UNIT | IV | 24/07/2012 | 1-000012 | engine OIL | HQ | 1 | 77.00 | | 77.00 |
| 300-A001 | ABC SDN BHD | sdf 789 | DIG230 | PCS | IV | 24/07/2012 | 1-000013 | DIG2 RELOAD CARD RM00 | HQ | | 30.00 | | 0.00 |
| 300-A001 | ABC SDN BHD | sdf 789 | DIG230 | PCS | IV | 24/07/2012 | 1-000013 | DIG2 RELOAD CARD RM00 | HQ | | 30.00 | | 0.00 |
| 300-A001 | ABC SDN BHD | sdf 789 | DIG230 | PCS | IV | 24/07/2012 | 1-000013 | DIG2 RELOAD CARD RM00 | HQ | 1 | 10.00 | | 10.00 |

Car List

Click on Car

List Tab and all the vehicles maintained under this account / debtor will

appear

Account Inquiry - WUDOKER (Home) - AutoAccount Accounting (Ver: 1.0)

File Edit View A/E Inquiry Stock Sales Purchase Workshop Plug In General Maintenance Tools Window Help

Account Inquiry

Date Range: 01/01/2007 To: 14/08/2012 Close

Account: 300-A001 Re-Inquiry Car Search Reg No.: sdf 789

☐ Show Transaction Description ☒ Show Double Entry Account Description ☒ Show Ref. 2 ☐ Add Profit(Loss) to Retained Earning

☐ Show Project ☐ Show Department

Basic Info

Account Name: ABC SDN BHD

Phone 1: Fax 1: Email Address:

Ledger Balance Aging Price History General Info Contact Car List Other Note

| Branch Code | Branch Name | Attention | Phone 1 | Phone 2 | Fax 1 | Fax 2 |
|-------------|-------------|-----------|---------|---------|-------|-------|
| sdf 789 | | | | | | |
| WCY 1234 | | | | | | |

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Image Search

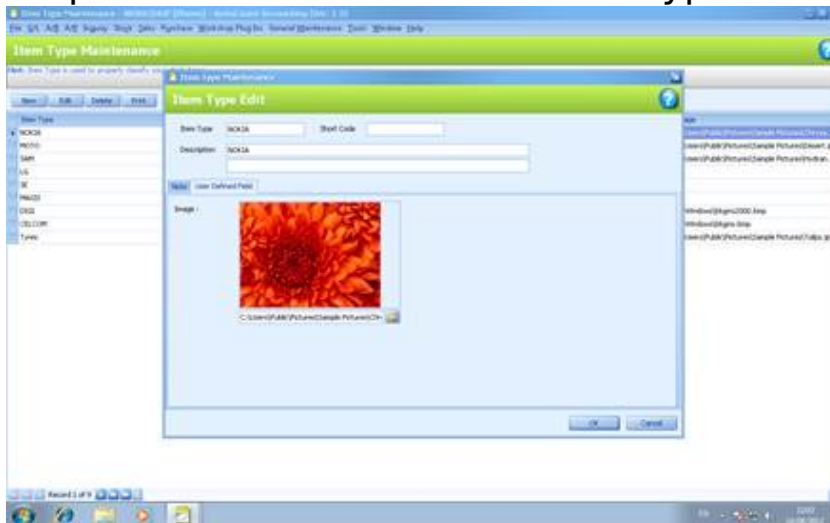



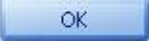
Navigation: New Help > [Workshop PlugIns](#) >

IMAGE SEARCH

This image search's special feature allowed you to select which item to show on image search when invoicing. Procedures as per below:

Step 1: Go to Stock > Stock Item Type Maintenance



Under User Defined Field: Click  Button to browse the image to identify this stock item type, and click  Button when complete.

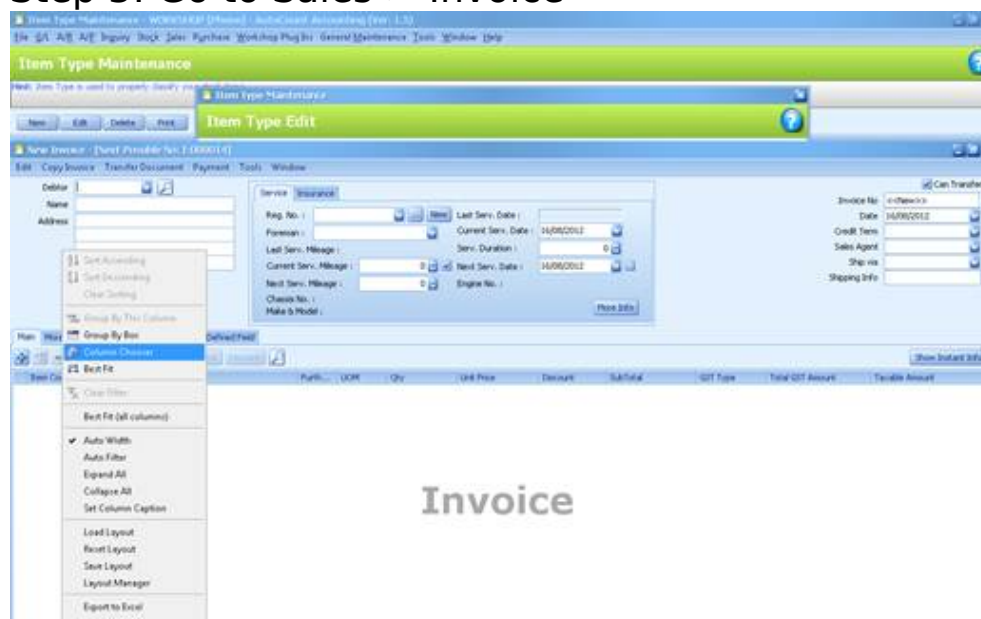
Step 2: Go to Workshop Plug Ins > Item Type Favorite Maintenance

margin-left:36.0pt;margin-bottom:.0001pt;tab-stops:200.1pt">Check those Item Type that frequently in use

margin-left:36.0pt;margin-bottom:.0001pt;tab-stops:200.1pt">

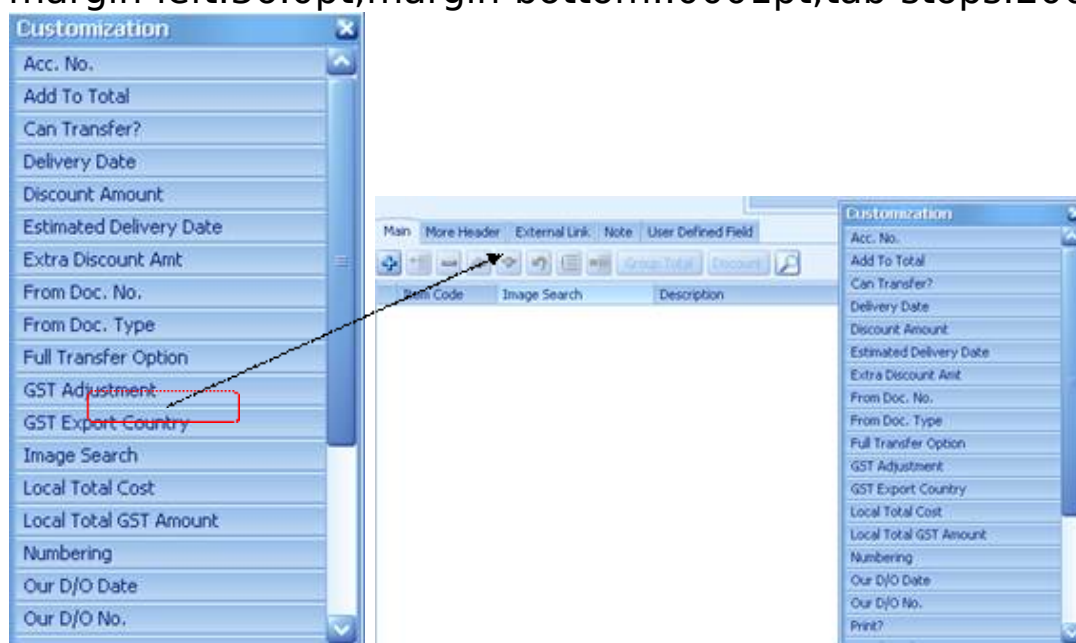


Step 3: Go to Sales > Invoice



Right click to select column chooser, it will prompt out a customization box as below, to scroll Image Search feature and place it next to Item Code Column

margin-left:36.0pt;margin-bottom:.0001pt;tab-stops:200.1pt">



After added Image Search feature next to Item Code, you can directly select an image from the item type favorite maintenance

Just click on the specific image and all item code under this item type will list down for selection.