

The intelligent choice.



# **IQ WORKSHOP MODULE**

## PREFACE

This is the IQ Workshop Module guide for IQ Business & IQ Enterprise software systems.

The document will aid in the configuration of the IQ Workshop Module for it to function correctly.

Although every effort has been made to keep this IQ Workshop Module document up to date, some of the screen examples may not be 100% the same as the ones reflected in previous versions of IQ Enterprise. This is due to the continuous development and improvement of IQ Enterprise.

Unfortunately, there will be a discrepancy from time to time. We do apologize for the inconvenience that it may cause. T.

Should you feel that the IQ Workshop Module document is inadequate or requires further explanation or more and better examples, please feel free to email us.

We would love to have some feedback to improve the IQ Workshop Module document in some way or another.

Regards,

IQ Retail (PTY) LTD



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# IQ WORKSHOP MODULE

The IQ Workshop Module is for the motor vehicle industry. It will allow users to add vehicles to their database and book vehicles in for work that needs to be carried out. Vehicle history is kept, enabling the user to provide statistics to manufacturers and clients. The IQ Workshop Module will work as job cards, but with added detail for vehicles.

This module is an add-on module that requires additional licencing and registration. You will only get access to the IQ Workshop Module, when you have received the additional registration.

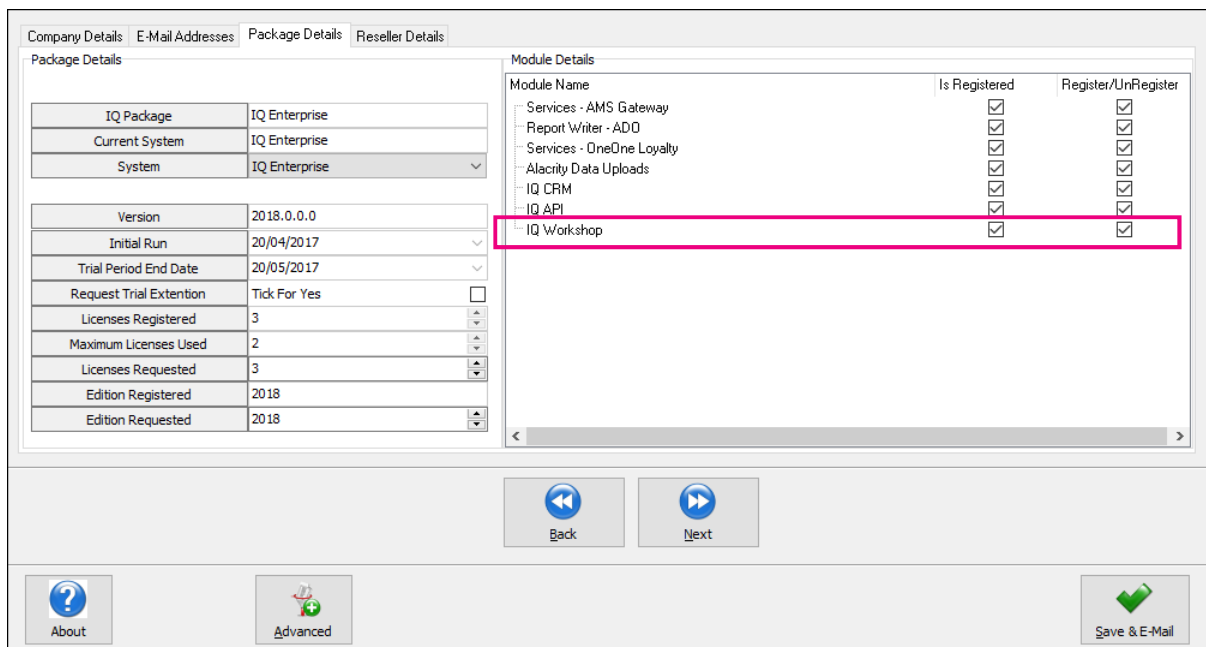


## REGISTER FOR WORKSHOP MODULE

Contact the Sales Department at IQ Retail for the latest prices on the software.

Select the Support Menu Option → Register IQ Enterprise.

Tick the box for 'Register' IQ Workshop under Module Details.



If the Save & Export option is used, email the reg.txt file to [registration@iqretail.co.za](mailto:registration@iqretail.co.za).

If the Save & E-mail is used, select the button at the bottom of the screen.

End User Licence Agreement

**END-USER LICENCE AGREEMENT**

**NOTE : Do not continue with the installation or continue to use the software until you have read this End-User Licence Agreement.**

**1. INTRODUCTION**

1.1. This End-user Licence Agreement ("the agreement") is available on the website [www.iqretail.co.za](http://www.iqretail.co.za) where the program is purchased online or packaged with the program and its documentation so that you may read it before downloading the program online or opening the sealed diskette package.

1.2. If you commence with downloading the program via the internet; open the diskette package, or if the envelope seal is tampered with, or you continue with the installation, IQ Retail (Pty) Ltd will assume you have read and agree to the terms and conditions of the agreement.

1.3. If you are NOT in agreement with any terms or conditions contained in the agreement, return the unopened package to the Seller from which you have purchased it for a refund of the purchase price less a small handling charge.

**2. DEFINITIONS**

2.1. "IQ Retail" shall mean IQ Retail (Proprietary) Limited, First Floor, Rhino House, 23 Quantum Road, Technopark, Stellenbosch, 7600, the legal distributor of the program.

2.2. "the USER" shall mean the original purchaser, either an individual, company or other legally constituted entity.

2.3. "PROGRAM" shall mean the software and related manuals and materials supplied in this package.

2.4. "COMPUTER" shall mean the single computer on which these programs are used.



2.5. "LICENCE" shall mean this agreement and the rights and obligations created hereunder by the local copyright laws.

2.6. "IQ RETAIL SYSTEMS LIBRARY" shall mean IQ Retail programs other than the programs supplied with this package.

2.7. "NETWORK MODULES" shall mean "program" designed for a single Local Area Network System with multiple workstations.

2.8. "SITE LICENCE" shall mean licensing rights for multiple single-user computers belonging to one individual, company, or other legally constituted entity.

I agree to the Terms and Conditions in the End User Licence Agreement

The End User Licence Agreement will appear on the screen. You must agree to the Terms and Conditions in the End User Licence Agreement by ticking the box and selecting the Accept button to continue to the e-mail setup screen and send the email as per normal.

Please send the Proof of Payment for the registration to [payments@iqretail.co.za](mailto:payments@iqretail.co.za).

After payment has been received, the registration will be sent back to the listed email in the registration details.

## REGISTRATION EMAIL

You will receive an email, save the reg.txt attachment to e.g. Desktop.

Example of email below:

Dear IQ Retail Client

Please find attached the registration file called "Reg.txt" for:

**Registration Details**

**Company Name** : IQ RETAIL ALDI O'CONNOR  
**License Name** : IQ RETAIL  
**System** : ENTERPRISE5  
**Edition** : 2017.0.0.0  
**Terminals** : 2  
**Telephone** : 0218800420  
**Address** : 25 QUANTUM ROAD  
 TECHNOPARK  
 STELLENBOSCH  
 7600

**Importing the Registration file**

For The Enterprise Family of Products

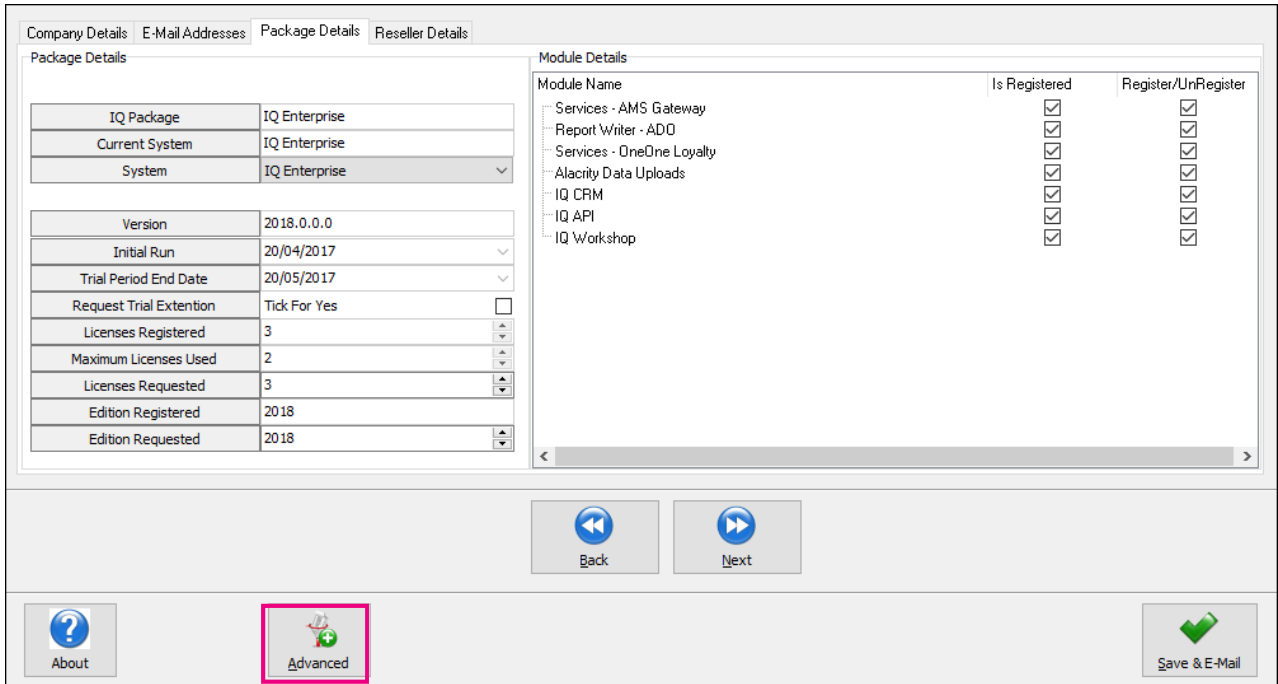
To import the registration file go to the registration screen and select the Advanced button.

From the Advanced button menu select the Import Registration.

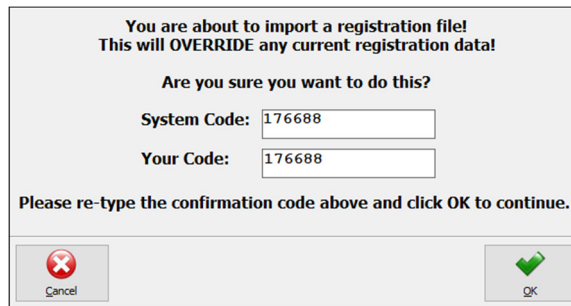
Locate the reg.txt file and select ok. You will be prompted with a message indication if the registration was imported successfully or not.

Please see attached image (registration\_help.jpg) for a visual explanation.

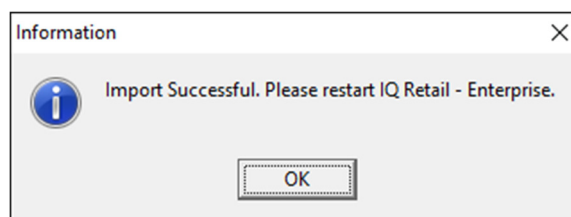
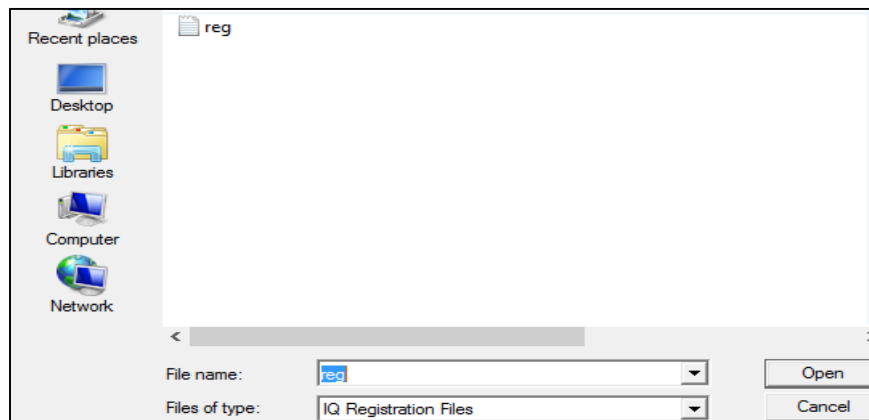
Select Support → Register IQ Enterprise → Click Advance → Import Registration.



Re-type the confirmation code (remember it is case sensitive) and select OK.



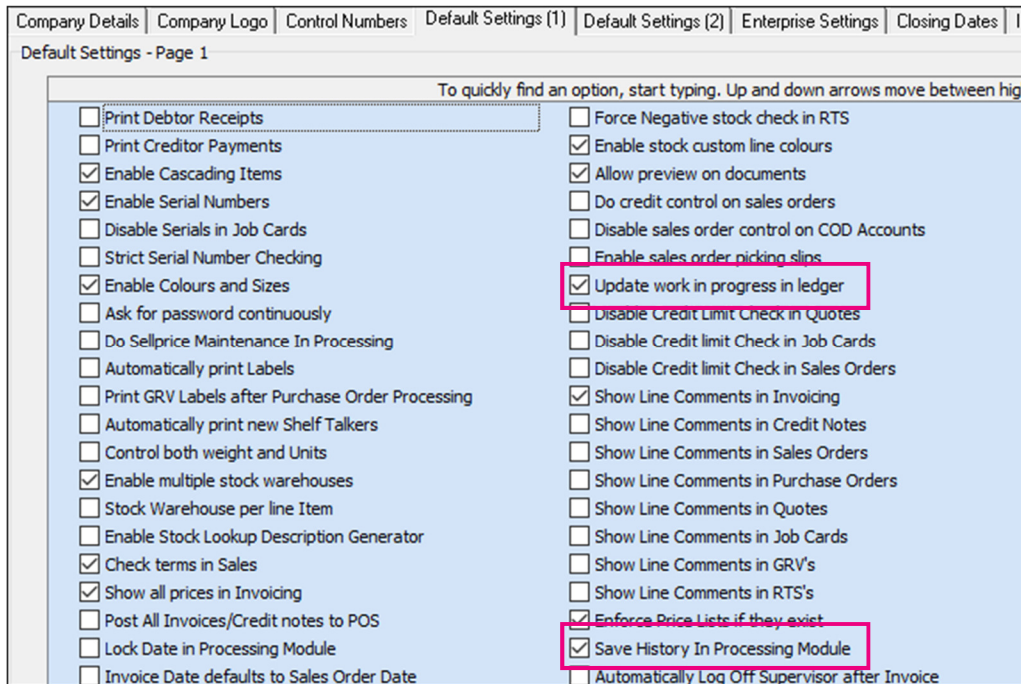
Go back to where the reg.txt file was saved and open it.



# SETUP

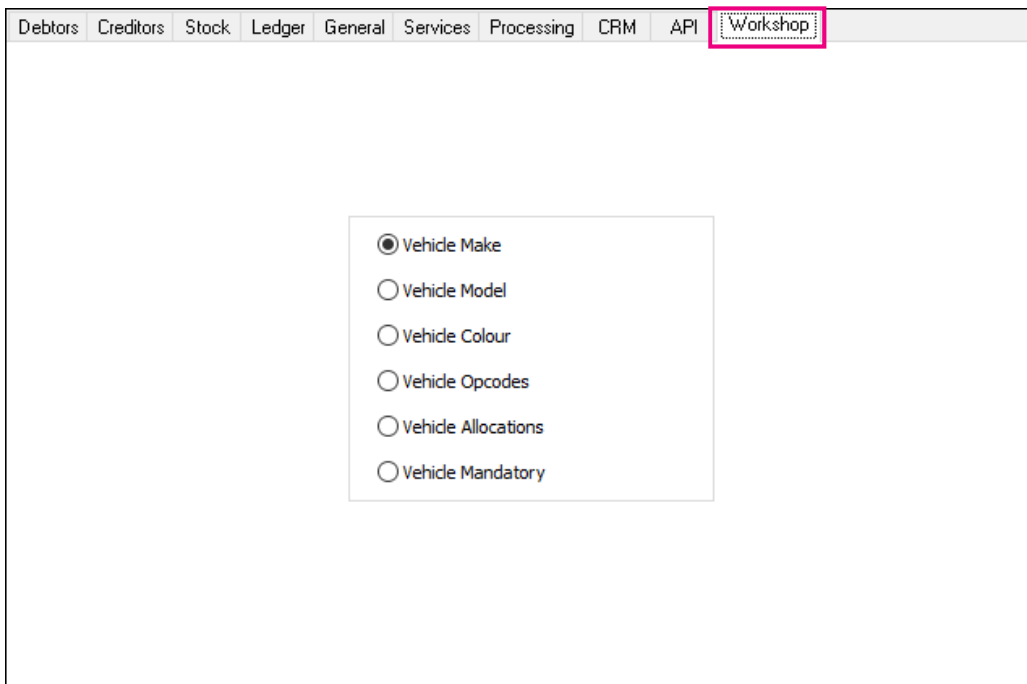
Select the Utilities Option → Setup → Company Details → Default Settings (1) tab.

Tick the boxes for 'Update Work in Progress in Ledger' and 'Save history in **Workshop** Module' and select the Accept button at the bottom of the screen.



## MODULE PARAMETERS (DEFAULT TABLES)

Select the Utilities Option → Setup → Module Parameters (Default Tables) → Workshop Tab.

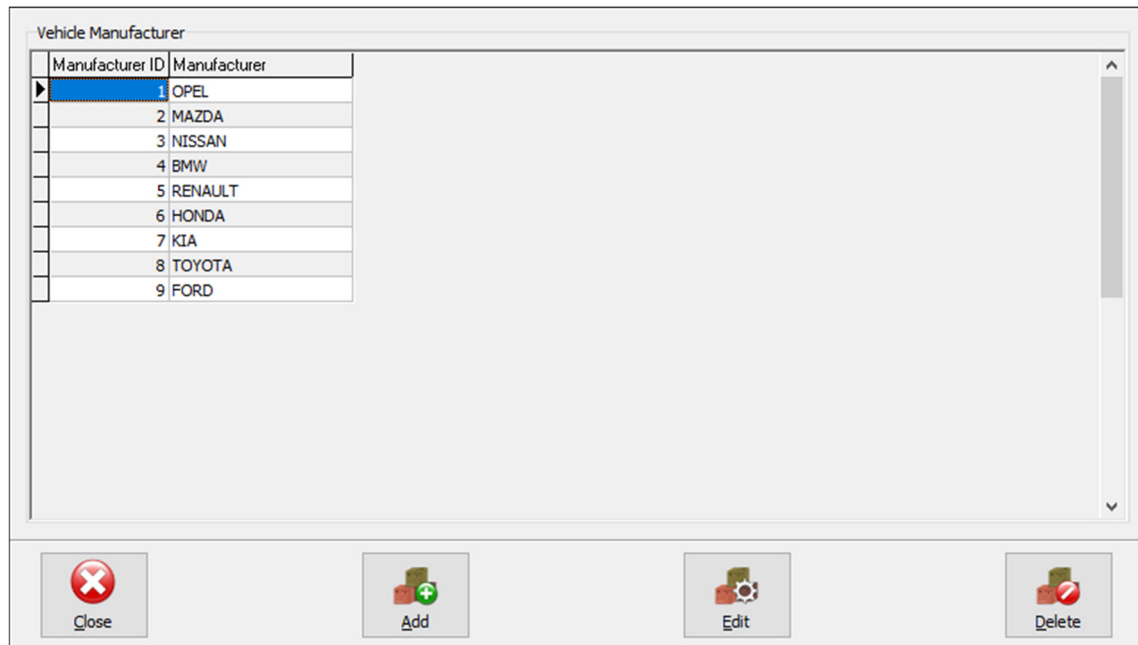


This is where you will setup the vehicle make, model, colour, opcodes and allocations. Add or amend all vehicle setup data in the Module Parameters. If a vehicle make or model has not been defined, you won't be able to use it.

Vehicle Mandatory fields can be defined, which will be required fields when vehicle information is captured in vehicle details. In other words, these fields must be filled in before the system will accept the data.

## VEHICLE MAKE

This option is used to setup the vehicle makes that will be accepted in the system.



<b>MANUFACTURER ID</b>	A Manufacturer ID is automatically added to each vehicle manufacturer captured in the system.
<b>MANUFACTURER</b>	The Manufacturer of the vehicle. This field is limited to 15 characters.
<b>BUTTON FUNCTIONALITY</b>	<p><b>CLOSE</b> Allows you to close the screen.</p> <p><b>ADD</b> Allows you to add a new vehicle manufacturer. Press F10 to save the newly added vehicle manufacturer.</p> <div data-bbox="564 1319 1449 1476" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Manufacturer: <input style="width: 150px;" type="text"/></p> <p>Selection</p> <p style="text-align: center;"> <input type="button" value="ESC Cancel"/> <span style="margin-left: 100px;"><input type="button" value="F10 Accept"/></span> </p> </div> <p><b>EDIT</b> Allows you to edit the vehicle manufacturer name. Press F10 to save the changes made.</p> <p><b>DELETE</b> Allows you to delete a vehicle manufacturer. Please ensure that this vehicle manufacturer is not used in any table anymore, before it is deleted.</p>

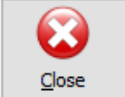


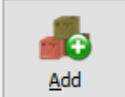
## VEHICLE MODEL

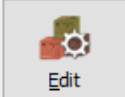
This option is used to setup the vehicle models per make, that will be accepted in the system.

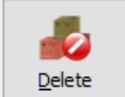
Vehicle Model

Manufacturer	Model
FORD	FIESTA 1.0 TITATIUM
FORD	IKON 1.6 AMBIENTE
FORD	KUGA 2.0 TDCI TITANIUM
FORD	BANTAM 1.6
HONDA	CIVIC VTEC
KIA	RIO 1.4 TEC
MAZDA	MX5
NISSAN	350 Z
NISSAN	370 Z
▶ OPEL	ASTRA 1.6 TURBO
OPEL	ADAM 1.4T SPORT
OPEL	CORSA 1.6 OPC
RENAULT	CLIO GT LINE 1.2 TURBO
TOYOTA	COROLLA 1.6
TOYOTA	TAZZ 1.3

  
Close

  
Add

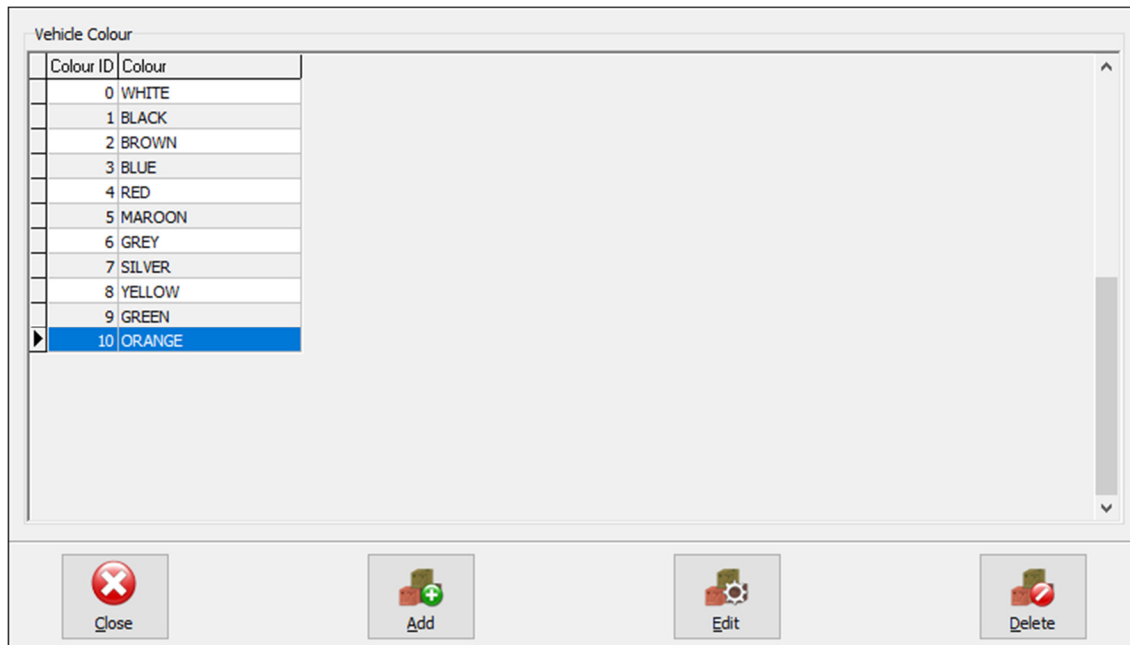
  
Edit

  
Delete

<b>MANUFACTURER</b>	A Manufacturer is selected from the drop-down menu (already created) manufacturers.
<b>MODEL</b>	The Model description of the vehicle. This field is limited to 35 alpha-numeric characters.
<b>BUTTON FUNCTIONALITY</b>	<p><b>CLOSE</b> Allows you to close the screen.</p> <p><b>ADD</b> Allows you to add a new vehicle model. Select the appropriate Vehicle Manufacturer from the drop-down menu and type the model description in. Press F10 to save the newly added vehicle model.</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px 0;"> <p>Manufacturer <span style="float: right;">▼</span></p> <p>Model: <input style="width: 100%;" type="text"/></p> <p style="text-align: center;">Selection</p> <p style="text-align: center;"> <input type="button" value="ESC Cancel"/> <span style="margin-left: 100px;"><input type="button" value="F10 Accept"/></span> </p> </div> <p><b>EDIT</b> Allows you to edit the vehicle model description. Press F10 to save the changes made.</p> <p><b>DELETE</b> Allows you to delete a vehicle model. Please ensure that this vehicle model is not used in any table anymore, before it is deleted.</p>

## VEHICLE COLOUR

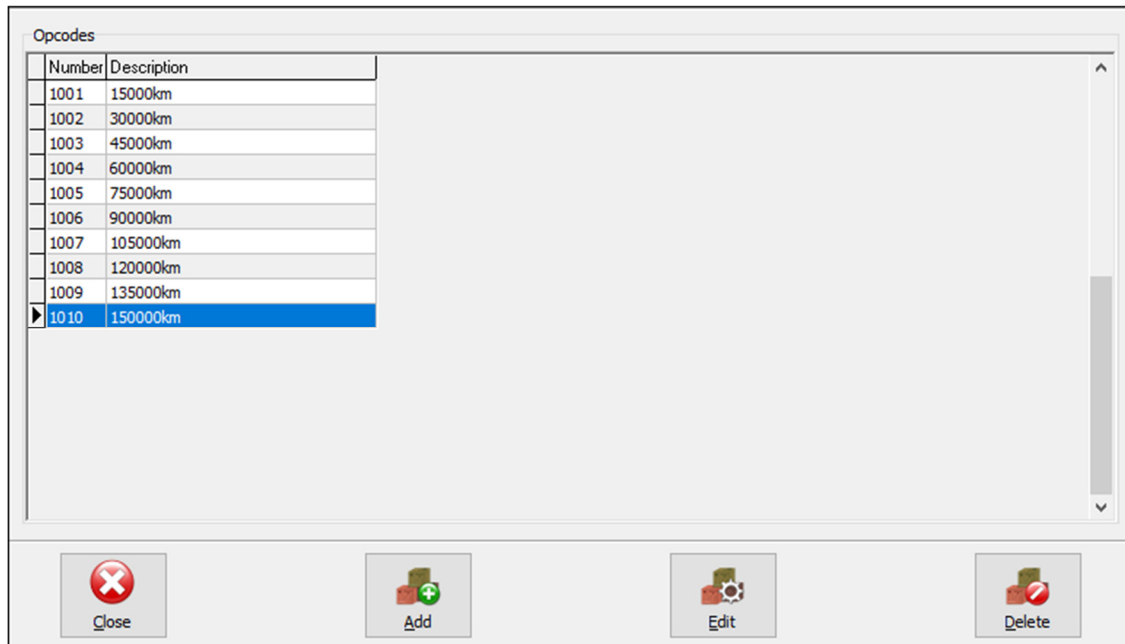
This option is used to setup the vehicle colours that will be accepted in the system.



<b>COLOUR ID</b>	A Colour ID is a user value added to each vehicle colour captured in the system.
<b>COLOUR</b>	A description of the colour of the vehicles.
<b>BUTTON FUNCTIONALITY</b>	<p><b>CLOSE</b> Allows you to close the screen.</p> <p><b>ADD</b> Allows you to add a new colour. Type in a numerical Colour ID and then type in the colour description. Press F10 to save the newly added vehicle colour.</p> <div data-bbox="564 1285 1449 1453" style="border: 1px solid black; padding: 5px;"> <p>Id: <input type="text"/></p> <p>Description: <input type="text"/></p> <p>Selection</p> <p style="text-align: center;"> <input type="button" value="ESC Cancel"/> <span style="margin-left: 100px;"><input type="button" value="F10 Accept"/></span> </p> </div> <p><b>EDIT</b> Allows you to edit the vehicle colour. Press F10 to save the changes made.</p> <p><b>DELETE</b> Allows you to delete a vehicle colour. Please ensure that this vehicle colour is not used in any table anymore, before it is deleted.</p>

## VEHICLE OPCODES

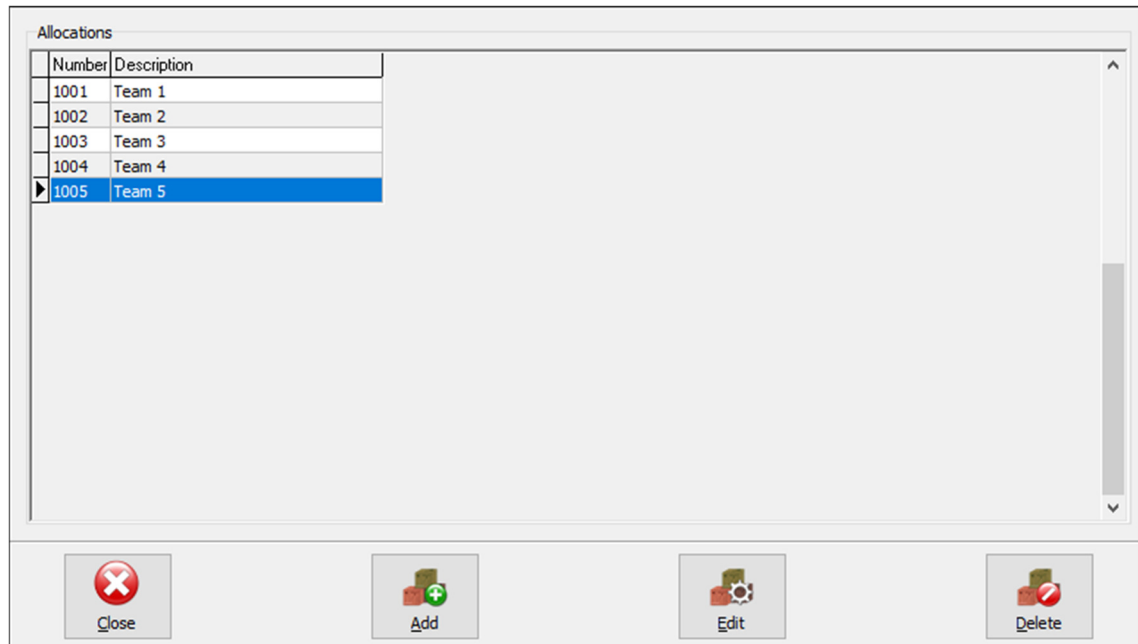
This option is used to setup the vehicle operational codes that will be accepted in the system. Manufacturers provide predefined operational codes that must be loaded to enable the user to revert information on.



<b>NUMBER</b>	A Number is added to each vehicle operational code captured in the system. The number is limited to 4 alpha-numeric characters.
<b>DESCRIPTION</b>	A description of the operational code provided for the vehicles.
<b>BUTTON FUNCTIONALITY</b>	<p><b>CLOSE</b> Allows you to close the screen.</p> <p><b>ADD</b> Allows you to add a new operational code. Type in an operational code number and then type in the operational description. Press F10 to save the newly added operational code.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Number: <input style="width: 150px;" type="text"/></p> <p>Description: <input style="width: 150px;" type="text"/></p> <p>Selection</p> <p style="text-align: center;"> <input type="button" value="ESC Cancel"/> <span style="margin-left: 100px;"><input type="button" value="F10 Accept"/></span> </p> </div> <p><b>EDIT</b> Allows to edit the operational code. Press F10 to save the changes made.</p> <p><b>DELETE</b> Allows you to delete an operational code. Please ensure that this operational code is not used in any table anymore, before it is deleted.</p>

## VEHICLE ALLOCATIONS

This option is used to setup the vehicle allocations that will be accepted in the system. In other words, which team is working on the vehicle.



<b>NUMBER</b>	A Number is added to each vehicle allocation captured in the system. The number is limited to 4 alpha-numeric characters.
<b>DESCRIPTION</b>	A description of the allocations of the vehicles. In other words, which team is working on the vehicle.
<b>BUTTON FUNCTIONALITY</b>	<p><b>CLOSE</b> Allows you to close the screen.</p> <p><b>ADD</b> Allows you to add a new vehicle allocation. Type in a vehicle allocation number and then type in the vehicle allocation description. Press F10 to save the newly added vehicle allocation.</p> <div data-bbox="564 1415 1449 1585" style="border: 1px solid black; padding: 5px;"> <p>Number: <input style="width: 150px;" type="text"/></p> <p>Description: <input style="width: 150px;" type="text"/></p> <p>Selection</p> <p style="text-align: center;"> <input type="button" value="ESC Cancel"/> <span style="margin-left: 100px;"><input type="button" value="F10 Accept"/></span> </p> </div> <p><b>EDIT</b> Allows you to edit the vehicle allocation. Press F10 to save the changes made.</p> <p><b>DELETE</b> Allows you to delete a vehicle allocation. Please ensure that this vehicle allocation is not used in any table anymore, before it is deleted.</p>

## VEHICLE MANDATORY

Mandatory fields can be defined to assist the user to ensure data integrity. A mandatory field is a required field that must be filled in before the system will accept the data.

In the Workshop Module, the Vehicle Registration Number is always a mandatory field.

You can select other fields by setting them up in Module Parameters → Workshop → Vehicle Mandatory.

Double click on the field name to select the mandatory field. The fields' colour will change to green to indicate that it is set as a mandatory field. On the Vehicle Maintenance screen the Mandatory fields will be highlighted in red.


### VEHICLE MANDATORY SETUP


Vehicle Details

**General Details**

Account Number	<input type="text"/>
Name	<input type="text"/>
Address	<input type="text"/>
Cellphone	<input type="text"/>
Email	<input type="text"/>
Registration Number	<input type="text"/>
Registration Date	<input type="text"/>
Serial Number	<input type="text"/>
Engine Number	<input type="text"/>
Chassis Number (VIN)	<input type="text"/>
ISO Code	<input type="text"/>
Year	<input type="text"/>
Make	<input type="text"/>
Model	<input type="text"/>
Engine Capacity (CC)	<input type="text"/>

Fuel Type	<input type="text"/>
Colour	<input type="text"/>
Gearbox	<input type="text"/>
Kilometers (KM)	<input type="text"/>
Vehicle Usage	<input type="text"/>
Vehicle Type	<input type="text"/>
Previous Service	<input type="text"/>
Next Service (Date)	<input type="text"/>
Next Service (KM)	<input type="text"/>
Next Service (Hours)	<input type="text"/>
Selling Dealer	<input type="text"/>
Policy Number	<input type="text"/>
Date Sold	<input type="text"/>
Opcode	<input type="text"/>
Allocation Code	<input type="text"/>





### IN VEHICLE MAINTENANCE


Vehicle Details


**General Details**

Account Number	D-018000000000
Name	<input type="text"/>
Address	<input type="text"/>
Postal Code	<input type="text"/>
Cellphone	<input type="text"/>
Email	<input type="text"/>
Registration Number	CF199348
Registration Date	29/04/2014
Serial Number	00000000999999999999
Engine Number	0000000099999999999900
Chassis Number (VIN)	0000000099999999999900
ISO Code	0000000099999999999900
Year	2014
Make	FORD
Model	IKON 1.6 AMBIENTE

Engine Capacity (CC)	1600
Fuel Type	Petrol
Colour	Maroon
Gearbox	Manual
Kilometers (KM)	95000
Vehicle Usage	Private
Vehicle Type	PC - Passenger Vehicle
Previous Service	01/11/2016
Next Service (Date)	23/08/2018
Next Service (KM)	<input type="text"/>
Next Service (Hours)	<input type="text"/>
Selling Dealer	Test
Policy Number	Test001
Date Sold	25/04/2016
Opcode	1001 - 1500km
Allocation Code	1002 - Team 2

Captured Date	<input type="text"/>
Captured User	<input type="text"/>
Edited Date	02/03/2018 12:02:23
Edited User	1

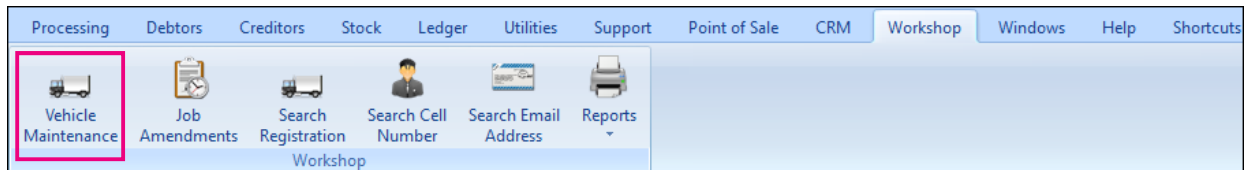




# FUNCTIONALITY


Vehicle information can be saved on the database. This allows for vehicles to be booked in for work to be carried out, without having to capture all information for a vehicle every time it comes for a service.

From the IQ main menu → Workshop → Vehicle Maintenance.



## VEHICLE MAINTENANCE

This is the database of all the vehicles that have been captured on your system.



Sort Order

Registration Number

Vin Number


Vehicle Make


Available Filters


Clear Filter


2010 Vehicles


AUTO	RegNum	AccNum	Name	Address1	Address2
▶	6 1	D-005	Debtor with Rep		
	7 2	D-008	COD Client		
	3 CF000000	D-008	COD Client		
	4 CF009009	D-000	Debtor with Details	PO Box 123	Hollywood
	1 CF111111	D-001	Normal Vat Client		
	5 CF199348	D-01800000000000	Debtor - Job Workshop Module Testing....	PO Box1	REGION
	2 CF222222	D-000	Debtor with Details	PO Box 123	Hollywood


  
 Select Visible Fields


  
 Filter

  
 Vehicle History

  
 Export

  
 Add

  
 Edit

  
 Delete

### SORT ORDER

The vehicle information in the grid can be sorted in Registration number order, Vin number order or Vehicle Make order.

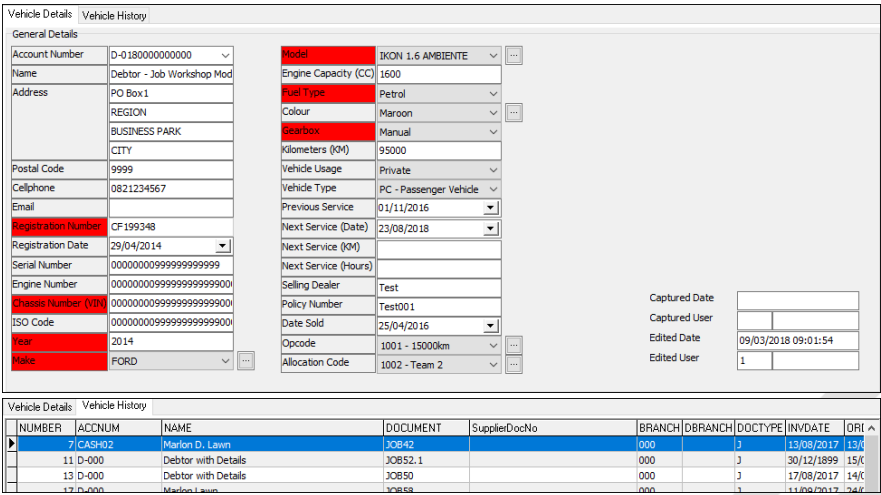
### AVAILABLE FILTERS

All filters created and saved for specific information from the Deliveries and Collections Maintenance screen, are listed under available filters. Double click on the filter to activate it and double click on "Clear Filter" to show all information again.

**GRID INFORMATION**

<b>REGISTRATION NO</b>	The Registration number of the vehicle.
<b>YEAR</b>	The year the vehicle was manufactured.
<b>MANUFACTURER</b>	The manufacturer of the vehicle.
<b>MODEL</b>	The model of the vehicle.
<b>COLOUR</b>	The main colour of the vehicle.
<b>KILOMETERS</b>	The odometer reading of the vehicle.
<b>ENGINE NO</b>	The engine number of the vehicle.
<b>VIN NO</b>	The VIN number of the vehicle.
<b>NEXT SERVICE</b>	The planned date of the next service.

**BUTTON FUNCTIONALITY**

<b>SELECT VISIBLE FIELDS</b>	This option enables the user to change the visible information on the screen.
<b>FILTER</b>	This option allows the user to filter for specific information on this screen. <b>NOTE:</b> The filter options are case-sensitive, meaning that if the description was captured as capital letters, the filter option also must be entered as capital letters.
<b>VEHICLE HISTORY</b>	The Vehicle history option allows the user to design, preview and print all the jobs previously completed for the selected vehicle.
<b>EXPORT</b>	The Export option allows the user to export a list of vehicles in the following formats: .CSV (comma separated), TXT, HTML, XML and XLS (Excel).
<b>ADD</b>	The Add option allows the user to add a new vehicle to the database.
<b>EDIT</b>	The Edit option allows the user to edit existing information on a selected vehicle. It also allows the user to see a list of all previous history of the vehicle.  
<b>DELETE</b>	The delete option allows the user to remove vehicle information from the database. Please ensure that there are no outstanding transactions before deleting the vehicle.

## ADD A VEHICLE

Vehicle Details
Vehicle History

**General Details**

Account Number	D-018000000000
Name	Debtor - Job Workshop Mod
Address	PO Box 1
	REGION
	BUSINESS PARK
	CITY
Postal Code	9999
Cellphone	0821234567
Email	
Registration Number	CF199348
Registration Date	29/04/2014
Serial Number	00000000999999999999
Engine Number	000000009999999999900
Chassis Number (VIN)	000000009999999999900
ISO Code	000000009999999999900
Year	2014
Make	FORD

Model	IKON 1.6 AMBIENTE
Engine Capacity (CC)	1600
Fuel Type	Petrol
Colour	Maroon
Gearbox	Manual
Kilometers (KM)	95000
Next Service (Hours)	
Selling Dealer	Test
Policy Number	Test001
Date Sold	25/04/2016
Opcode	1001 - 15000km
Allocation Code	1002 - Team 2

Captured Date	05/09/2017
Captured User	1
Edited Date	09/03/2018 09:01:54
Edited User	2 CASHIER

Cancel

Accept

Mandatory fields are highlighted in red. They must be completed before the data will be accepted.

### GENERAL DETAILS

<b>ACCOUNT NUMBER</b>	If there is a debtors account linked to the owner of the vehicle, it can be selected.  For cash account customers, the account number can be left blank.
<b>NAME</b>	The vehicle owner's name or the name of the company or person responsible for payment for the account.
<b>ADDRESS</b>	Address if the owner or company.
<b>POSTAL CODE</b>	Postal Code of the debtor.
<b>CELLPHONE</b>	Cell phone number of the contact person.  <b>NOTE:</b> We suggest that you make this a mandatory field, as this is one of the easy search fields for the vehicle.
<b>EMAIL</b>	Email address of the contact person.  <b>NOTE:</b> We suggest that you make this a mandatory field, as this is one of the easy search fields for the vehicle.
<b>REGISTRATION NUMBER</b>	The Registration Number is the number that identifies the specific vehicle and proves who owns it and where it has been registered. This number is limited to 10 alpha-numeric characters.  <b>NOTE:</b> The Registration number of the vehicle defaults to be a mandatory field.
<b>REGISTRATION DATE</b>	The Registration Date is the first date the vehicle was registered on this registration number.
<b>SERIAL NUMBER</b>	The Serial Number is an identification number of the vehicle. This number is limited to 20 alpha-numeric characters.
<b>ENGINE NUMBER</b>	The Engine Number is the number of the engine of the vehicle. This number is limited to 30 alpha-numeric characters.

A Kerridge Commercial Systems Company

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<b>CHASSIS NUMBER (VIN)</b>	The Chassis Number is the number of the chassis of the vehicle. This number is limited to 30 alpha-numeric characters.
<b>ISO CODE</b>	The ISO Code is used to identify the control that activates the road vehicle stability control system and indicate its operational status. This number is limited to 30 alpha-numeric characters.
<b>YEAR</b>	The Model year of the vehicle. In other words, the year in which the vehicle was manufactured.
<b>MAKE</b>	The make of the vehicle.
<b>MODEL</b>	The model of the vehicle.
<b>ENGINE CAPACITY (CC)</b>	Engine capacity of the vehicle (measured in liters – 2000 for 2 litre))
<b>FUEL TYPE</b>	Does this vehicle run on petrol, diesel or is it a hybrid?
<b>COLOUR</b>	The main colour of the vehicle.
<b>GEARBOX</b>	Is it a manual or automatic gearbox?
<b>KILOMETERS (KM)</b>	The kilometre reading on the odometer.
<b>VEHICLE USAGE</b>	What this vehicle is used for: private use, business, fleet or other.
<b>VEHICLE TYPE</b>	You must choose between a Commercial vehicle and a Passenger vehicle.
<b>PREVIOUS SERVICE</b>	The date the previous service was done.
<b>NEXT SERVICE (DATE)</b>	The date the next service is planned.
<b>NEXT SERVICE (KM)</b>	Description of the next service. If this previous service was i.e. 30000km service the next service will be 45000km.
<b>NEXT SERVICE (HOURS)</b>	Some vehicles are serviced by hours worked (i.e. tractors).
<b>SELLING DEALER</b>	The dealer who sold this previously owned vehicle.
<b>POLICY NUMBER</b>	If the client has a service contract, the policy number can be captured here.
<b>DATE SOLD</b>	The date this vehicle was sold to the current client.
<b>OPCODE</b>	The opcode will be selected when the vehicle is booked in for the service. If the vehicle is not yet booked for a service, you can leave this field open.
<b>ALLOCATION CODE</b>	The Team responsible for the vehicle's service is selected when the vehicle is booked in. If the vehicle is not yet booked for a service, you can leave this field open.
<b>CAPTURED DATE</b>	The date the vehicle information was captured on the system.
<b>CAPTURED USER</b>	The user that captured the vehicle information on the system.
<b>EDITED DATE</b>	The date the vehicle information was edited on the system.
<b>EDITED USER</b>	The user that edited the vehicle information on the system.
<b>BUTTON FUNCTIONALITY</b>	<p><b>CANCEL</b> Cancel changes made on the screen without saving and exit the screen.</p> <p><b>ACCEPT</b> Save changes made on the screen and exit the screen.</p>

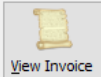


### VEHICLE HISTORY


Vehicle Details		Vehicle History								
NUMBER	ACCNUM	NAME	DOCUMENT	SupplierDocNo	BRANCH	DBRANCH	DOCTYPE	INVDAT	ORI	
15	D-000	Debtor with Details	JOB61		000		J	24/08/2017	24/0	
16	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB63		000		J	07/09/2017	07/0	
18	D-000	Marlon Dane Lawn	JOB65		000		J	11/09/2017	11/0	
19	D-000	Marlon D Lawn	JOB56		000		J	11/09/2017	23/0	
23	D-000	Marlon Dane Lawn	JOB66		000		J	12/09/2017	11/0	
24	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB68		000		J	18/09/2017	18/0	
28	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB71		000		J	30/12/1899	19/0	
33	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB80		000		J	30/12/1899	13/0	
34	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB80.1		000		J	30/12/1899	13/0	
35	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB80.2		000		J	30/12/1899	13/0	
36	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB80.3		000		J	30/12/1899	13/0	
37	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB80.4		000		J	30/12/1899	13/0	
38	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB71.1		000		J	13/10/2017	19/0	
43	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB81		000		J	30/12/1899	13/0	
44	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB82		000		J	30/12/1899	13/0	
45	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB86		000		J	30/12/1899	17/0	
46	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB86.1		000		J	30/12/1899	17/0	
47	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB84		000		J	30/12/1899	13/0	
48	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB80.5		000		J	30/12/1899	13/0	
49	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB84.1		000		J	09/03/2018	13/0	



Cancel



View Invoice



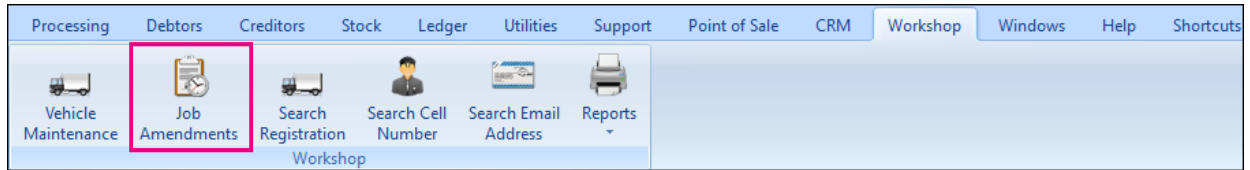
Accept

All jobs previously done on the selected vehicle are listed on the Vehicle History Tab.

#### BUTTON FUNCTIONALITY

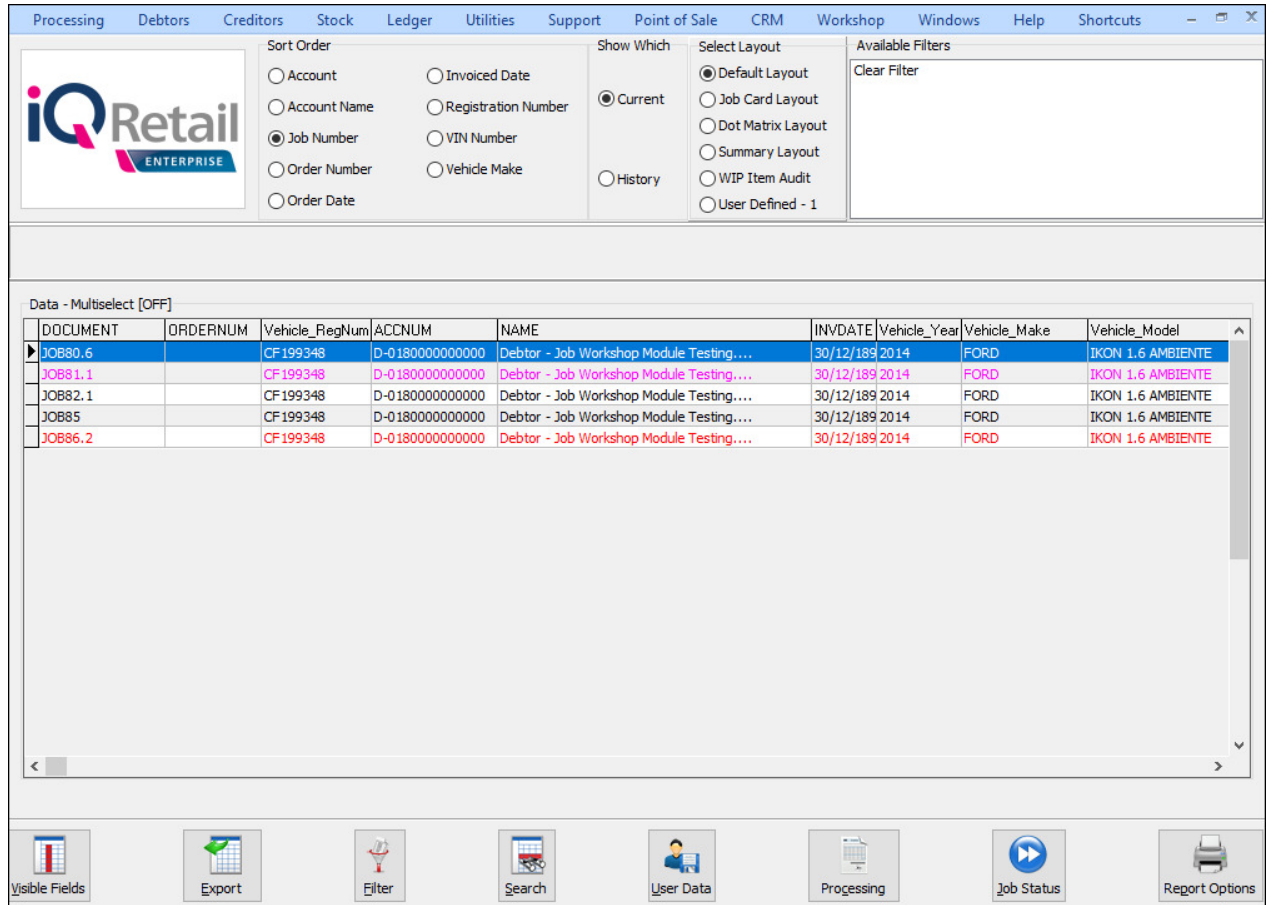
<b>CANCEL</b>	The cancel option allows you to close the Vehicle Maintenance, without saving any changes made to the Vehicle information.
<b>VIEW INVOICE</b>	The View Invoice option allows you to view the invoice for a selected job previously processed.
<b>ACCEPT</b>	The Accept option allows you to Accept all changes made to all the vehicle information. This button works for the vehicle details screen.

# JOB AMENDMENTS



The Job Amendments are completed each time a vehicle is booked or brought in for a service or for work to be done on the vehicle. These job amendments work as job cards where parts, labour and outwork is captured and invoiced.

The Job Amendments allow the user to capture exactly what must be done and you can keep track of where the job is in the process by looking at the status. The Job Status is colour coded to make it easy to identify the status of a job.



## SORT ORDER

The Sort order allows the user to sort the existing jobs into any of the following sequences: Account, account Name, Job Number, Order Number, Order Date, Invoiced Date, Registration Number, Vin Number or Vehicle make.

## SHOW WHICH

<b>CURRENT</b>	The current option will show all the current job cards, which means any new job card that is created will display under the current option.
<b>HISTORY</b>	The history option will show all the job cards that have been completed or the ones that were deleted from current. This means that is a job card is completed, it will move to the historical view automatically. Once a job is deleted from current, it will be listed under the history option.

## SELECT LAYOUT

The Select Layout option allows the user to preview any of the existing jobs on six different layouts.

## AVAILABLE FILTERS

All filters created and saved for specific information from the Job Amendments screen, are listed under available filters. Double click on the filter to activate it and double click on "Clear Filter" to show all information again.

### DATA

<b>DOCUMENT</b>	The document is the job number which is automatically allocated to each job as it is created.
<b>ORDERNUM</b>	The order number field is used for the job card purpose. In other words, if the job requires additional parts or components, this order number field is used to tie up the job with the purchase order.
<b>VEHICLE_REGNUM</b>	The registration number of the vehicle.
<b>ACCNUM</b>	The account number of the client or owner of the vehicle.
<b>NAME</b>	The name of the client or owner of the vehicle, as it is stored on the system.
<b>VEHICLE_YEAR</b>	The model year of the vehicle.
<b>VEHICLE_MAKE</b>	The make of the vehicle.
<b>VEHICLE_MODEL</b>	The model of the vehicle.
<b>VEHICLE_CHASSISNUM</b>	The chassis number (VIN) of the vehicle.
<b>ORDDATE</b>	The order date, the date the job is started.
<b>INVDATA</b>	The invoice date, the date the invoice is processed for the job. This date will only reflect once the selected job has been invoiced.
<b>TOTAL</b>	The total field shows the total costing amount of the job in progress. This field will change if any modifications or new items are added to the job.
<b>VEHICLE_NEXTSERVICE</b>	The planned date for the next service of this vehicle.

### BUTTON FUNCTIONALITY

<b>VISIBLE FIELDS</b>	This option enables the user to change the visible information on the screen.
<b>EXPORT</b>	The Export option allows the user to export a list of jobs in the following formats: .CSV (comma separated), TXT, HTML, XML, XLS (Excel) and IQ XML.
<b>FILTER</b>	This option allows the user to filter for specific information on this screen. <b>NOTE:</b> The filter options are case-sensitive, meaning that if the description was captured as capital letters, the filter option also must be entered as capital letters.
<b>SEARCH</b>	The search option allows the user to search for specific information on the grid.
<b>USER DATA</b>	The user data option is only available if the user has setup user defined data. The user defined data is additional information that has been setup in Module Parameters → General and captured by selecting a job and selecting this button.
<b>PROCESSING</b>	This option allows you to tell the system which process you want to perform on a job card, create a new job card, edit, delete, copy, invoice or import an existing job card. Is there Outwork to be done on a job card?



	<p><b>NEW</b></p> <p>To create a new job, select the New option. (We will explain later in this document how to create a new job.)</p> <p><b>EDIT</b></p> <p>The Edit option allows you to edit any existing job.</p> <p><b>DELETE</b></p> <p>The delete option allows you to delete either a completed or uncompleted job. When a job is deleted, the system moves it to the job history.</p> <p><b>COPY</b></p> <p>The copy option allows you to create a new job by copying an existing job.</p> <p><b>INVOICE</b></p> <p>The Invoice option allows you to invoice any of the existing jobs straight from the job card screen. (See later in this document more about invoice).</p> <p><b>OUTWORK</b></p> <p>The outwork option is for sending jobs to other suppliers. This option allows you to keep track of repair jobs that were sent to other suppliers.</p> <p>Example: If a vehicle needs bodywork for an insurance claim, this option will be used for this purpose. (See later in this document how Outwork works)</p> <p><b>IMPORTS</b></p> <p>The Import option allows you to import job card information.</p>
<p><b>JOB STATUS</b></p>	<p>The job Status option tells you where in the process the vehicle or job card is. The Job status is colour coded to enable you to identify the status easily:</p> <div style="display: flex; justify-content: space-around; align-items: flex-start;"> <div data-bbox="687 1135 1090 1326" style="border: 1px solid black; padding: 5px;"> <ol style="list-style-type: none"> <li>1. Vehicle Booked-In</li> <li>2. Work In Progress</li> <li>3. Waiting For Parts</li> <li>4. Vehicle Cleaning Service</li> <li>5. Vehicle Collection/Delivery</li> </ol> </div> <div data-bbox="1161 1124 1324 1326" style="border: 1px solid black; padding: 5px;"> <p>Job Status</p> <p>Reserved</p> <p>Booked-In</p> <p>Work in Progress</p> <p>Waiting For Parts</p> <p>Cleaning Service</p> <p>Collection/Delivery</p> </div> </div> <p>Once any of these options have been selected for a job, the status of the job updates automatically.</p>
<p><b>REPORT OPTIONS</b></p>	<p>The Report Options allow you to Preview, Print, Design or Email the selected job card.</p>

## CREATING A NEW JOB CARD


To add a new job to be done on a vehicle: from the IQ main menu → Workshop → Job Amendments → Processing → New.

A new job card will appear. The job card has three main areas Document details with customer account information and the Workshop Details that is divided into Vehicle Details and Job Details.

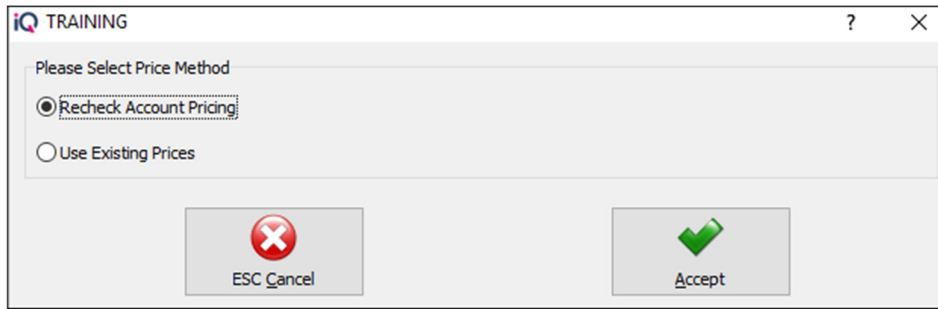
**NOTE:** The new Job Card will always default to the Cash Account and the debtors account will only change once the registered vehicle is selected and it belongs to a debtor on the system.

### DOCUMENT DETAILS

The Document Details tab is where you select the client or owner of the vehicle's information.

**NOTE:** The job Card defaults to the CASH account information, you must click on the  next to the account number to select another account.

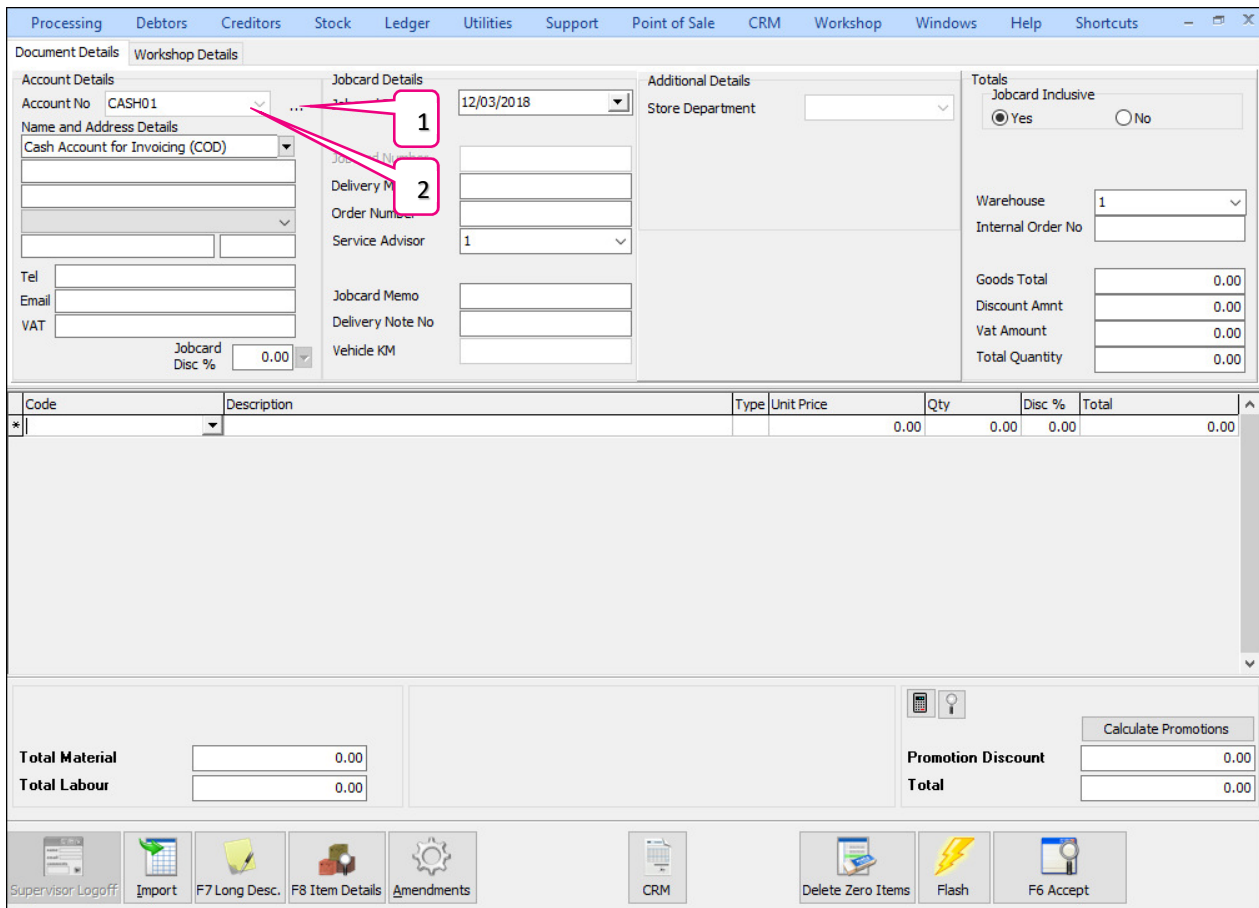
A Price Method Selection box will appear:



Select the “Recheck Account Pricing” option, which will allow you to select the appropriate debtor from the drop-down menu next to the Account No.

**OR**

You can select the vehicle on Workshop details. If the vehicle is linked to a debtors account, the account information on account details will automatically change to the debtors account information.



<b>ACCOUNT NO</b>	The account no is the account number of the customer. Select the Debtor customer from the debtors list.
<b>ADDRESS DETAILS</b>	The address details of the debtor customer. These details are obtained from the debtors’ master file. Details can be captured manually if required for cash customers.
<b>TEL</b>	The telephone number information is obtained from the Debtors master file, or it can be captured manually.
<b>EMAIL</b>	The email address information is obtained from the Debtors master file, or it can be captured manually.

<b>VAT</b>	The VAT number information is obtained from the Debtors master file, or it can be captured manually.
<b>JOBCARD DISC %</b>	The Jobcard Discount % is discount allowed on the total amount of the transaction, also known as document discount.

<b>JOBCARD DATE</b>	The job card date is the date the job card is opened.
<b>JOBCARD NUMBER</b>	If it is a new job card, this number will be greyed out. The job card number is automatically allocated once the job card is accepted.
<b>DELIVERY METHOD</b>	
<b>ORDER NUMBER</b>	The order number provided can be captured in this field.
<b>SERVICE ADVISOR</b>	Select the service advisor from the drop-down menu.
<b>JOBCARD MEMO</b>	Capture a memo if required in this field.
<b>DELIVERY NOTE NO</b>	A delivery note number can be captured in this field.
<b>STORE DEPARTMENT</b>	If the store is divided into different departments, the appropriate department can be selected from the drop-down menu.
<b>TOTALS – JOBCARD INCLUSIVE</b>	<p><b>YES</b> If Yes is selected it means that the line totals displayed are inclusive of VAT.</p> <p><b>NO</b> If No is selected it means that the line totals displayed are exclusive of VAT.</p>
<b>WAREHOUSE</b>	The warehouse option allows you to select a warehouse so that when the items are sold or used for a job and the job card is converted to an invoice, the goods will be sold from that warehouse.
<b>INTERNAL ORDER NO</b>	The internal order number can be used for any internal orders in the company.
<b>GOODS TOTAL</b>	The Goods total displays the total of all the goods on the current job card, exclusive of VAT. This field will be automatically updated.
<b>DISCOUNT AMNT</b>	The discount amount field displays the discount amount automatically, if there was discount given on the full job card value.
<b>VAT AMOUNT</b>	The VAT amount field displays the total vat amount of the full value of the specific job card. The Vat Amount field will automatically be populated with the value.
<b>TOTAL QUANTITY</b>	The total quantity of stock items and hours labour used for this job card transaction.

Code	Description	Type	Unit Price	Qty	Disc %	Total
016	Colovers - Ford Ikon/Figo	PO	5 814.00	1.00	0.00	5 814.00
LAB001	Labour Cost	PO	114.00	2.00	0.00	228.00

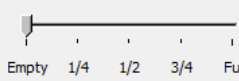
<b>Total Material</b>	5814.00	<b>Promotion Discount</b>	0.00
<b>Total Labour</b>	228.00	<b>Total</b>	6042.00


<b>TOTAL MATERIAL</b>	The total amount for the material used for this job card transaction.
<b>TOTAL LABOUR</b>	The total amount for labour for this job card transaction.
<b>CALCULATE PROMOTIONS</b>	If there were any items that had running promotions on, select this button to apply the calculation of the promotions.
<b>PROMOTIONAL DISCOUNT</b>	The total amount of promotional discount on this job card transaction.
<b>TOTAL</b>	The total is the amount due by the customer.

**WORKSHOP DETAILS – VEHICLE DETAILS**

Document Details | Workshop Details

General Details - Account: Debtor - Job Workshop Module Testing, ...

Registration No	CF199348	Serial Number	00000000999999999999	Next Service (KM)		Tank  Empty 1/4 1/2 3/4 Full Radio <input type="radio"/> Yes <input checked="" type="radio"/> No Tools <input type="radio"/> Yes <input checked="" type="radio"/> No Spare Wheel <input type="radio"/> Yes <input checked="" type="radio"/> No
Registration Date	29/04/2016	Engine Number	00000000999999999999	Next Service (Hrs)		
Year	2014	Chassis Number (VIN)	00000000999999999999	Selling Dealer	Test	
Manufacturer	FORD	ISO Code	00000000999999999999	Policy Number	Test001	
Model	IKON 1.6 AMBIENTE	Kilometers (KM)	95000	Date Sold	25/04/2016	
Engine (CC)	1600	Vehicle Usage	Private	Opcode	1001 - 15000km	
Fuel Type	Petrol	Vehicle Type	PC - Passenger Vehicle	Allocation Code	1002 - Team 2	
Colour	Maroon	Previous Service	01/11/2016			
Gearbox	Manual	Next Service	23/08/2018			

<b>REGISTRATION NO</b>	If the vehicle is already registered on your database, select the appropriate vehicle from the drop-down menu next to the field.  If this vehicle has not yet been captured on the database, select the  button next to the field. The vehicle maintenance screen will appear, where all the relevant information for the vehicle can be captured.
<b>VEHICLE DETAILS</b>	All the vehicle details will be obtained from the vehicle maintenance screen.
<b>TANK</b>	Drag the arrow to indicate how full the fuel tank of the vehicle is, when it is booked in for the service or repair.
<b>RADIO</b>	Select Yes or No if the radio is still in the vehicle when it is booked in.
<b>TOOLS</b>	Select Yes or No if there are any tools in the vehicle when it is booked in.
<b>SPARE WHEEL</b>	Select Yes or No if the spare wheel is still in the vehicle when it is booked in.



### WORKSHOP DETAILS – JOB DETAILS

Capture any instructions to the works team in the Instructions field.

Capture what work was done on the vehicle in Work Performed field.

Code	Description	Type	Unit Price	Qty	Disc %	Total
016	Coilovers - Ford Ikon/Figo	PO	5 814.00	1.00	0.00	5 814.00
LAB001	Labour Cost	PO	280.00	2.00	0.00	560.00

Document Details   Workshop Details	
Instructions	Perform Vehicle Service Check knocking noise on right rear Tyre Replace left reverse Light bulb
Work Performed	Vehicle Service Completed - No added faults has been found

Any previous jobs completed on this vehicle can be seen by selecting the job and clicking on the View Job button. Everything on the previous Job Card can be viewed.

NUMBER	ACCNUM	NAME	DOCUMENT	SupplierDocNo	BRANCH	DBRANCH	DOC
15	D-000	Debtor with Details	JOB61		000		J
16	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB63		000		J
18	D-000	Marlon Dane Lawn	JOB65		000		J
19	D-000	Marlon D Lawn	JOB56		000		J
23	D-000	Marlon Dane Lawn	JOB66		000		J
24	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB68		000		J
28	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB71		000		J
33	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB80		000		J
34	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB80.1		000		J
35	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB80.2		000		J
36	D-0180000000000	Debtor - Job Workshop Module Testing....	JOB80.3		000		J

Any stock items that are used to perform the job, must be captured on the grid. The stock items will be all materials and labour used to perform the job.

Code	Description	Type	Unit Price	Qty	Disc %	Total
016	Coilovers - Ford Ikon/Figo	PO	5 814.00	1.00	0.00	5 814.00
LAB001	Labour Cost	PO	114.00	2.00	0.00	228.00

<b>CODE</b>	Enter the stock code number and press Enter, or use the search facility to search for the appropriate stock item.
<b>DESCRIPTION</b>	The stock description as defined in the Item Maintenance section will be displayed. Press Enter to accept this description.
<b>TYPE</b>	The Type field displays different types of pricing that is used once the stock item is entered. P0 = Original Price, P1 =-- Retail Price, P2 = Wholesale Price, P3 = Alternative Price1, CL = Latest Cost, CA = Average Cost, CH = Highest Cost, CB = Base Cost, PL = Custom Price List, PM = Promotion Price etc..
<b>UNIT PRICE</b>	If selling price changes are not allowed, this field will not be accessible. The normal selling price or the linked price for the debtor will appear in this field.
<b>QTY</b>	Enter the quantity of the item to be used or sold or credited.
<b>DISC %</b>	Enter the line item discount percentage, if any.
<b>TOTAL</b>	The total field automatically displays the full line total. In other words, if the item price is R10.00 and the quantity is 5, then the line total will display R50.00.

**JOB CARD**

Workshop: Job Card						
<b>IQ RETAIL (PTY) LTD</b> 25 QUANTUM ROAD TECHNOPARK STELLENBOSCH 76 00			Telephone            021 880 0420 Fax                      021 880 0488 E Mail                  info@iqretail.co.za Vat Registration No   4760205510 Invoice Date            11/09/2017			
<b>Job For</b>  Marlon Dane Lawn 69 Highbury Road Highbury Kuils River 75 80			<b>Vehicle</b>  Registration No      CF199348 Year                     2014 Model                   FORD Make                    IKON 1.6 AMBIENTE VIN                      0000000099999999990000000000			
<b>Account No</b>	<b>Invoice Date</b>	<b>Order Number</b>	<b>Representative</b>	<b>Job Card Number</b>	<b>Page</b>	
D-000	11/09/2017		1 Jimi	JO B65	1 of 1	
<u>Instructions</u> 100000km Service			<u>Work Performed</u> Service Rotated Tyres Brake Test Shocks Test Replaced cambelt			
Item Code	Description	Quantity	Unit Price	Disc %	Vat Amt	Line Total
LAB001	Labour Cost	6.00	245.61		206.32	1 473.68
001	Cambelt	1.00	3 070.18		429.82	3 070.18
002	Brakes Test	4.00	110.00		61.60	440.00
003	Shocks Test	4.00	51.00		28.56	204.00
<b>Extra Charges</b>		Number of Items <b>15</b>  Qualified Promotional Discount		<b>Subtotal ( Exclusive)</b> Discount <b>Vat</b> <b>Total</b>		<b>5 187.86</b>   <b>726.30</b>  <b>5 914.16</b>

### BUTTON FUNCTIONALITY

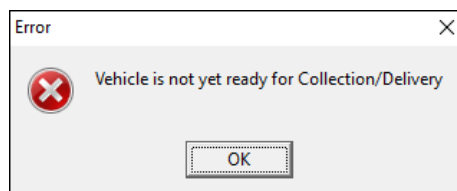


<b>SUPERVISOR LOGON/LOGOFF</b>	Select Supervisor Logon to be able to make changes that require the supervisor access level.
<b>IMPORT</b>	The import button allows the you to import stock item information into the job card.
<b>F7 LONG DESC.</b>	Use the long description option when the stock item code is asked for in the body of the invoice. This descriptive memo will be printed below each item code line entry on the invoice. if there is a requirement to add a comment that pertains to the invoice and not to an item, select the F7 Long Desc. Option when the last item on the invoice is highlighted.
<b>F8 ITEM DETAILS</b>	The item details option allows you to view the current item’s details. This means that the item that is currently highlighted in the screen, that item’s details will be seen if the item details option has been selected.
<b>CRM</b>	This button is only visible when you are registered for the CRM module, but the CRM Module is still in development.
<b>DELETE ZERO ITEMS</b>	<p><b>DELETE ZERO ORDER QUANTITY</b></p> <p>If there are any items with zero quantities, they call all be deleted by selecting this option.</p> <p><b>DELETE ZERO REMAINING QUANTITY</b></p> <p>If there are any items with zero remaining quantities on a partially invoiced job card, they can be deleted by selecting this option.</p>
<b>FLASH</b>	The flash option allows you to draw a quick flash report that has been setup specific to workshop job amendments. This makes it easy if you need to see what the item was sold for previously to the relevant debtor.
<b>F6 ACCEPT</b>	Select the accept option to save all the data captured or the changes made to the job card.

### INVOICING OF JOB CARD

The invoicing option under processing allows you to convert a job card into an invoice.

Only a job card where the job status is no 5 - Vehicle Collection/Delivery, can be converted to an invoice. If the vehicle is not yet ready for collection or delivery, you will get an error message:



**NOTE:** If the invoice must be processed before the vehicle is ready for collection or delivery, you must change the job status to 5. Vehicle Collection/Delivery.

Remember that you won’t be able to edit the job card after it has been invoiced.

## OUTWORK

The Outwork option is for sending repair jobs to suppliers. This option allows you to keep track of the repair jobs that were sent to other service suppliers.

Example: A vehicle is sent for panel beating after an accident, this job must be done before you can repair and replace some parts.

The screenshot displays the IQRetail software interface. At the top left is the IQRetail logo. The main area is divided into two sections: 'Job Information' and 'Outwork Data'.  
**Job Information:** A form with fields for Job Number (JOB85), Account (D-0 180000000000), Registration (CF199348), Contact, and Date (17/10/2017).  
**Status Definition:** A list of status options: 1 = New, 2 = At supplier, 3 = Returned from supplier, and 4 = Processed.  
**Outwork Data:** A table with columns: Item Code, Supplier, Description, Cost, Price, and Status. The first row shows Item Code '016', Supplier (blank), Description 'Collovers - Ford Ikon/Figo', Cost '5000', Price 'R5 500.00', and Status '1'.  
**Bottom Bar:** A row of icons for Report, Delete, Send, Return, Reset, and Accept.

### JOB INFORMATION

<b>JOB NUMBER</b>	The Job number refers to the number assigned to the job card that was selected for this vehicle.
<b>ACCOUNT</b>	The account field shows the customer/debtor's account number that is stored on the system.
<b>REGISTRATION</b>	Type the registration details of the item or the relevant client.
<b>CONTACT</b>	The contact field holds the name of the contact person the supplier where this job is currently situated.
<b>DATE</b>	The date the job is expected to be completed.

### STATUS DEFINITION

The status field indicates the status of the job as it is with the supplier.

<b>1 = NEW</b>	If the vehicle or item has not yet been sent to the supplier, the status will be 1. (New job)
<b>2 = AT SUPPLIER</b>	If the vehicle or item has been sent to the supplier, then the status is updated to 2. Select the Send button at the bottom of the screen to change the status to 2.

<b>3 = RETURNED FROM SUPPLIER</b>	If the vehicle or item has been repaired and returned, the status must be updated to 3. Select the Return button at the bottom of the screen to change the status to 3.
<b>4 = PROCESSED</b>	Once the job has been completed, the status will be updated to 4.

### OUTWORK DATA

<b>ITEM CODE</b>	The item code of the item that is being sent away for repair.
<b>SUPPLIER</b>	The supplier field shows the supplier where the job has been sent to for the repair. The supplier field access the creditors database and therefore must already exist on the system.
<b>DESCRIPTION</b>	The description field shows the description of the stock item that has been sent away to the supplier for repair.
<b>COST</b>	The cost field refers to the cost of this item that has been placed on the job card for repairs. The cost price is exclusive of VAT.
<b>PRICE</b>	The price field indicates the selling price of the item. The price is exclusive of VAT.
<b>STATUS</b>	The status field indicates the status of the job as it is at the supplier.

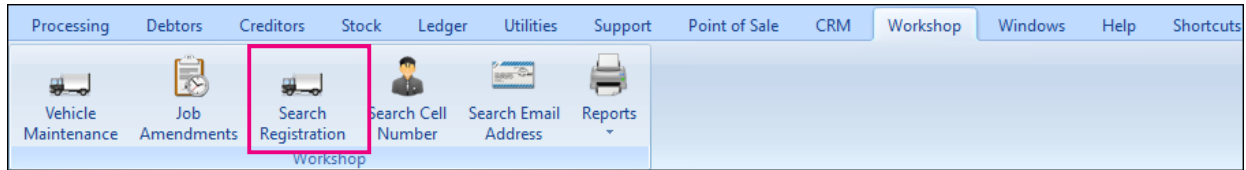
### BUTTON FUNCTIONALITY

<b>REPORT</b>	The report option allows you to change the design of the Outwork Report.
<b>DELETE</b>	The Delete option allows you to delete any existing information currently in the outwork.
<b>SEND</b>	The send option sets the status of the vehicle or item as "Sent to Supplier" (Status 2).
<b>RETURN</b>	The Return option sets the status of the vehicle or item as "Returned from Supplier" (Status 3).
<b>RESET</b>	The Reset option rests the status of the vehicle to "New" (Status 1).
<b>ACCEPT</b>	The accept option allows you to save the newly or modified outwork entry.

**NOTE:** The buttons that change the status of the vehicle have security attached to them. This means that each button can be configured with a security access level.



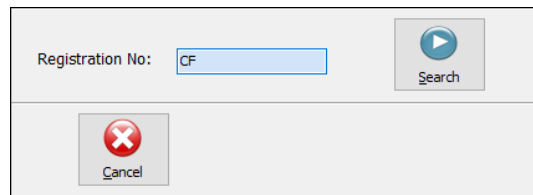
## SEARCH REGISTRATION



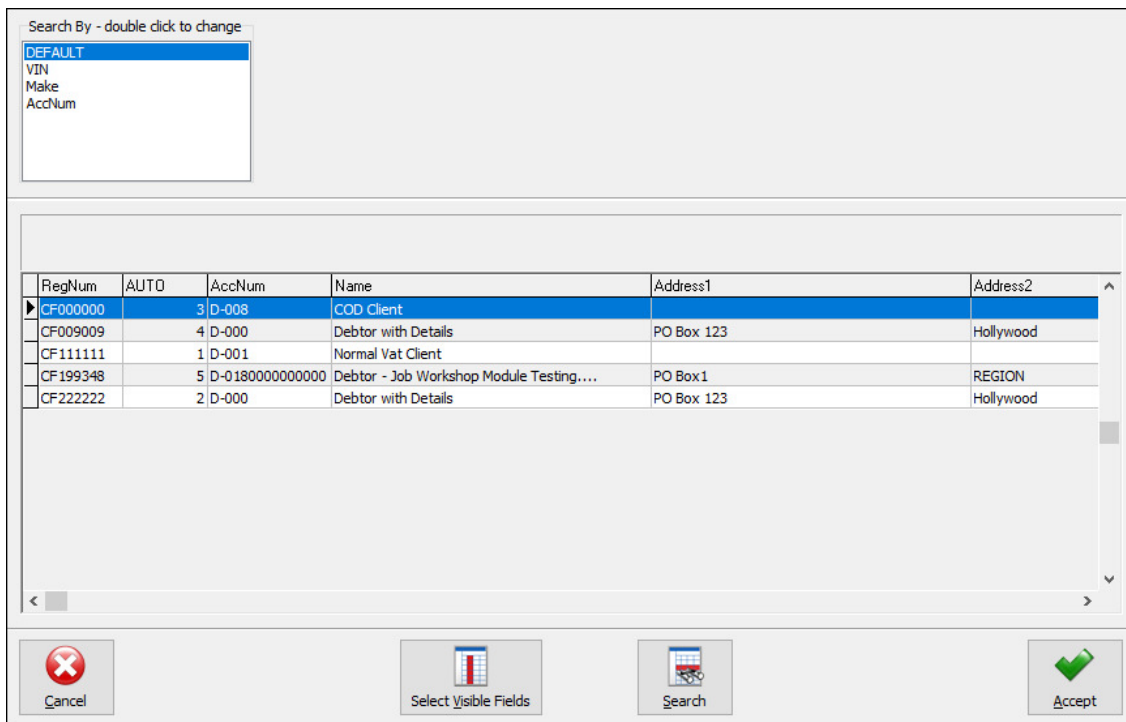
The search registration option enhances the search of a vehicle when a client books a service, when it finds the vehicle, a job card will be opened.

If an existing Registration number is entered and the search button is selected, a job card will open.

If you don't have the full Registration number, you can enter the number up to where you have it and then select the search button. In other words, if you know the registration number starts with CF, but you don't know the rest, you can type in CF in the search screen and select the search button.

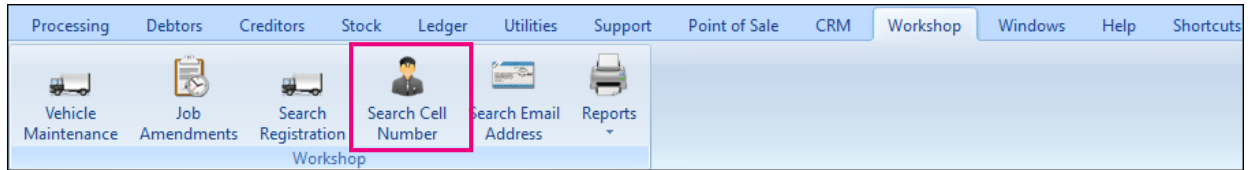


The Vehicle Search screen will appear with all vehicles that start with CF. If there is only one vehicle that starts with CF, the job card will open.



**IMPORTANT:** Always check if a vehicle is not yet on the system, before creating new records. You will end up with duplicated data.

## SEARCH CELL NUMBER



The search cell number option enhances the search of a vehicle when a client books a service.

The screenshot shows a search input form. It has a label 'Cellphone No:' followed by a text input field containing the number '0821234567'. To the right of the input field is a blue 'Search' button with a play icon. Below the input field is a red 'Cancel' button with a red 'X' icon.

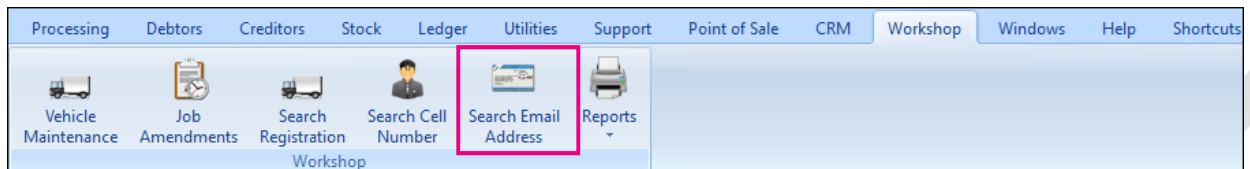
Once the Cell number is entered and the search button is selected, a Vehicle Search screen will appear, with all the vehicles linked to this cell number listed or open a job card if only one vehicle is found. The user must select the correct vehicle to open a new job card.

The screenshot shows the 'Vehicle Search' screen. At the top, there is a dropdown menu labeled 'Search By - double click to change' with options: DEFAULT, VIN, Make, and AccNum. Below this is a table with the following data:

RegNum	AUTO	AccNum	Name	Address1	Ac
CF 009-009		4 D-000			
CF 222-222		2 D-000			

At the bottom of the screen, there are four buttons: a red 'Cancel' button, a 'Select Visible Fields' button, a 'Search' button, and a green 'Accept' button.

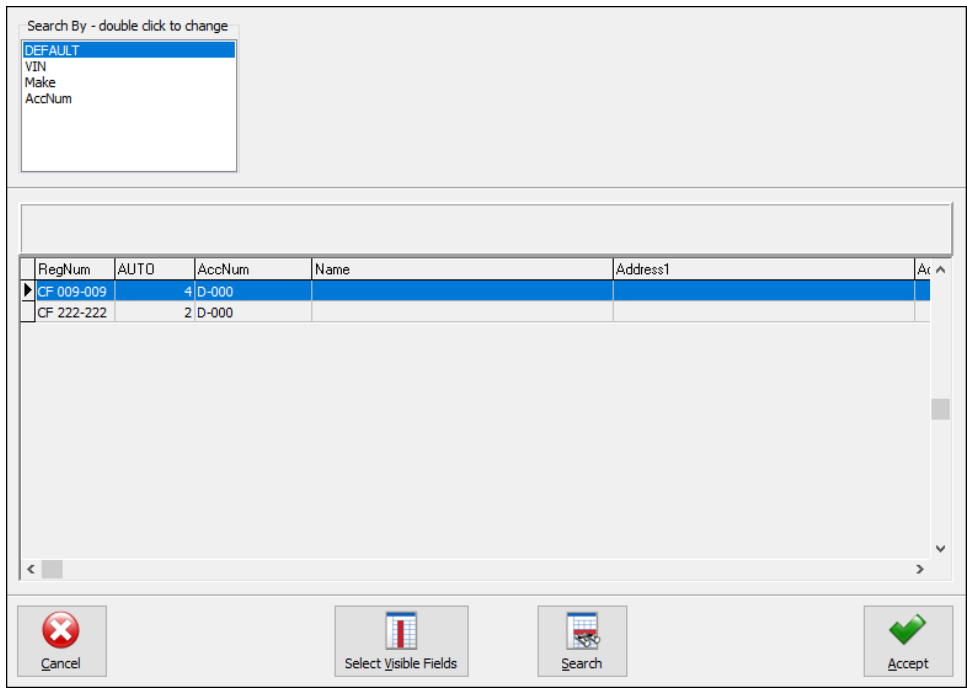
## SEARCH EMAIL ADDRESS



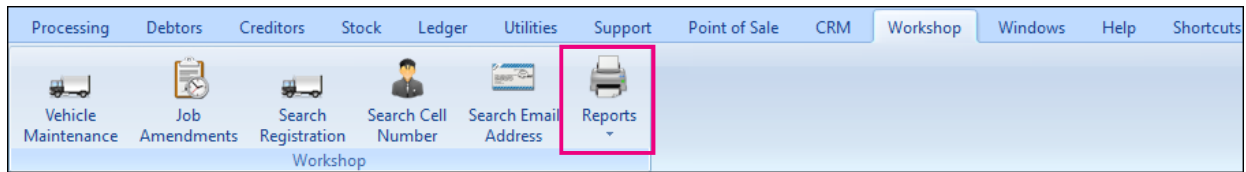
The search email address option enhances the search of a vehicle when a client books a service.

The screenshot shows a search input form. It has a label 'Email Address:' followed by a text input field containing the email address 'LON@IQRETAIL.CO.ZA'. To the right of the input field is a blue 'Search' button with a play icon. Below the input field is a red 'Cancel' button with a red 'X' icon.

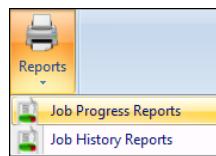
Once the email address and the search button is selected, a Vehicle Search screen will appear, with all the vehicles linked to this email address, or will open a job card if only one vehicle is found. listed. The user must select the correct vehicle to open a new job card.



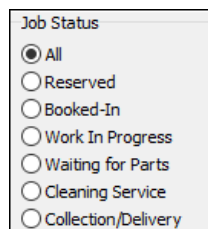
## REPORTS



## JOB PROGRESS REPORTS



The Job Progress Reports option provides you with the option to list current jobs by status. Select the Job status and export, preview, print or email the report as required.





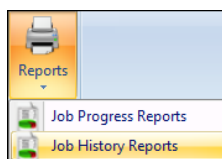
Job Number	Order No	Registration No	Account	Name	Year	Manufacturer	Model	VIN No	Start
JOB80.5		CF 199-348	D-01800000	Debtor - Job Workshop Module Testin	2014	FORD	IKON 1.6 AMBIENTE	000000009999999999990000000000	13/1
JOB81.1		CF 199-348	D-01800000	Debtor - Job Workshop Module Testin	2014	FORD	IKON 1.6 AMBIENTE	000000009999999999990000000000	13/1
JOB82.1		CF 199-348	D-01800000	Debtor - Job Workshop Module Testin	2014	FORD	IKON 1.6 AMBIENTE	000000009999999999990000000000	13/1
JOB85		CF 199-348	D-01800000	Debtor - Job Workshop Module Testin	2014	FORD	IKON 1.6 AMBIENTE	000000009999999999990000000000	17/1
JOB86.2		CF 199-348	D-01800000	Debtor - Job Workshop Module Testin	2014	FORD	IKON 1.6 AMBIENTE	000000009999999999990000000000	17/1
JOB84.1		CF 199-348	D-01800000	Debtor - Job Workshop Module Testin	2014	FORD	IKON 1.6 AMBIENTE	000000009999999999990000000000	13/1

**BUTTON FUNCTIONALITY**

<b>SELECT VISIBLE FIELDS</b>	This option enables the user to change the visible information on the screen.
<b>FILTER</b>	This option allows the user to filter for specific information on this screen. <b>NOTE:</b> The filter options are case-sensitive, meaning that if the description was captured as capital letters, the filter option also must be entered as capital letters.
<b>REPORT OPTIONS</b>	The Report Options allow you to Preview, Print, Design or Email the report.
<b>EXPORT</b>	The Export option allows the user to export the report in the following formats: .CSV (comma separated), TXT, HTML, XML and XLS (Excel).
<b>CLOSE</b>	Allows you to close the screen.

**JOB HISTORY REPORTS**

The Job History report provides a list of all the job cards that are in the history view.



Job Number	Order No	Registration No	Account	Name	Year	Manufacturer	Model	VIN No	Start
JOB18			D-000	Debtor with Details					08/0
JOB19			D-000	Debtor with Details					08/0
JOB20			D-000	Debtor with Details					08/0
JOB21			D-000	Debtor with Details					10/0
JOB39		CF 009-009	CASH02	Marlon D. Lawn	2017	RENAULT	CLIO GT LINE 1.	11111111111111111111	13/0
JOB39.1		CF 009-009	CASH02	Marlon D. Lawn	2017	RENAULT	CLIO GT LINE 1.	11111111111111111111	13/0
JOB42		CF 222-222	CASH02	Marlon D. Lawn	2016	OPEL	ASTRA 1.6 TURBO	99999999999999999999	13/0
JOB43		CF 009-009	D-000	Debtor with Details	2017	RENAULT	CLIO GT LINE 1.	11111111111111111111	13/0
JOB54		CF 009-009	D-017	Debtor_Job_Workshop	2017	RENAULT	CLIO GT LINE 1.2 TURBO	1111111111111111111111111111111111	16/0
JOB52.1		CF 222-222	D-000	Debtor with Details	2000	KIA	RIO 1.4 TEC	00000000000000000000	15/0
JOB55		CF 009-009	D-017	Debtor_Job_Workshop	2017	RENAULT	CLIO GT LINE 1.2 TURBO	1111111111111111111111111111111111	16/0
JOB50		CF 222-222	D-000	Debtor with Details	2016	OPEL	ASTRA 1.6 TURBO	9999999999999999999999	14/0
JOB55.1		CF 009-009	D-017	Debtor_Job_Workshop	2017	RENAULT	CLIO GT LINE 1.2 TURBO	1111111111111111111111111111111111	16/0
JOB61		CF 199-348	D-000	Debtor with Details	2014	FORD	IKON 1.6 AMBIENTE	000000009999999999990000000000	24/0
JOB63		CF 199-348	D-01800000	Debtor - Job Workshop Module Testin	2014	FORD	IKON 1.6 AMBIENTE	0000000099999999999999990000000000	07/0
JOB58		CF 222-222	D-000	Marlon Lawn	2016	OPEL	ASTRA 1.6 TURBO	9999999999999999999999	24/0
JOB65		CF 199-348	D-000	Marlon Dane Lawn	2014	FORD	IKON 1.6 AMBIENTE	0000000099999999999999990000000000	11/0
JOB56		CF 199-348	D-000	Marlon D Lawn	2014	FORD	IKON 1.6 AMBIENTE	0000000099999999999999990000000000	23/0
JOB51		CF 222-222	D-000	Debtor with Details	2016	OPEL	ASTRA 1.6 TURBO	9999999999999999999999	15/0
JOB51.1		CF 222-222	D-000	Marlon Dane Lawn	1995	MAZDA	MX5	1	15/0
JOB67		CF 222-222	D-001	Marlon Lawn	2016	OPEL	ASTRA 1.6 TURBO	9999999999999999999999	11/0
JOB66		CF 199-348	D-000	Marlon Dane Lawn	2014	FORD	IKON 1.6 AMBIENTE	0000000099999999999999990000000000	11/0
JOB68		CF 199-348	D-01800000	Debtor - Job Workshop Module Testin	2014	FORD	IKON 1.6 AMBIENTE	0000000099999999999999990000000000	18/0
JOB69		CF 111-111	D-01800000	Debtor - Job Workshop Module Testin	2010	FORD	BANTAM 1.6	v46ds1vds	18/0

**BUTTON FUNCTIONALITY**

<b>SELECT VISIBLE FIELDS</b>	This option enables the user to change the visible information on the screen.
<b>FILTER</b>	This option allows the user to filter for specific information on this screen. <b>NOTE:</b> The filter options are case-sensitive, meaning that if the description was captured as capital letters, the filter option also must be entered as capital letters.
<b>REPORT OPTIONS</b>	The Report Options allow you to Preview, Print, Design or Email the report.
<b>EXPORT</b>	The Export option allows the user to export the report in the following formats: .CSV (comma separated), TXT, HTML, XML and XLS (Excel).
<b>CLOSE</b>	Allows you to close the screen.

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