



AMADOR SOLUTIONS  
*AutoPoint*<sup>®</sup> Evolution  
Work Order Defaults



*AutoPoint*<sup>®</sup> Evolution – Work Order Defaults



## Legal Notice

Amador Business Computers (ABC) has prepared this documentation for use by ABC personnel, customers, and prospective customers. The information contained herein shall not be reproduced in whole or in part without ABC's prior written approval.

ABC reserves the right to make changes in information contained in this documentation without prior notice, and the reader should in all cases consult ABC to determine whether any such changes have been made.

The terms and conditions governing the sales of the *AutoPoint*<sup>®</sup> Software product and/or other products and the licensing of said software consist solely of those set forth in the written contracts between ABC and its customers. No representation or other affirmation of fact contained in this documentation including but not limited to statements regarding suitability for use or performance of the functions described herein shall be deemed to be a warranty by ABC for any purpose, or give rise to any liability of ABC whatsoever.

In no event shall ABC be liable for any incidental, indirect, special or consequential damages whatsoever (including but not limited to lost profits) arising out of or related to this documentation or the information contained in it, even if ABC has been advised, knew or should have known of the possibility of such damages.

*AutoPoint*<sup>®</sup> is a Registered Trademark of Amador Business Computers.

© Copyright Amador Business Computers, 2009

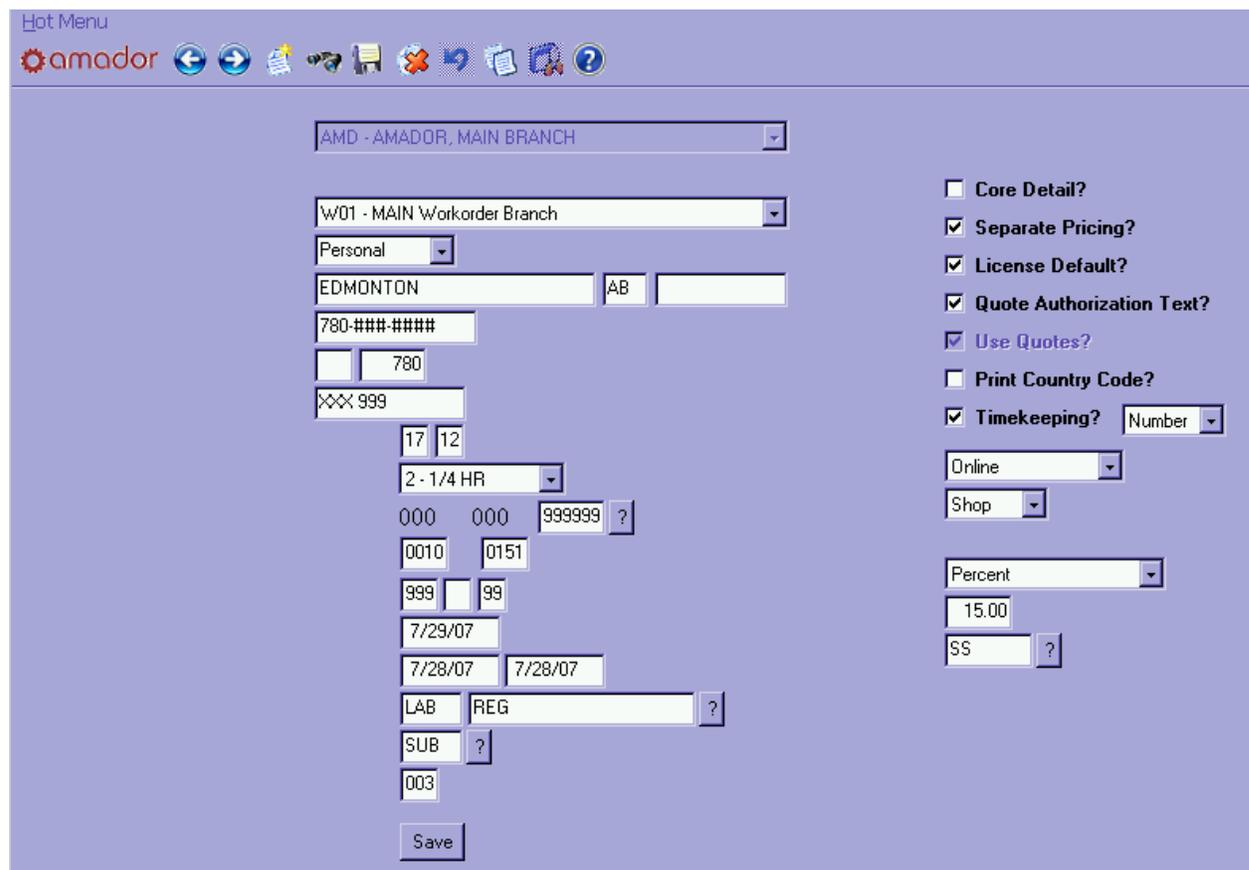
## WORK ORDER DEFAULTS MAINTENANCE

**Purpose:** To allow you to maintain the Work Order Defaults Record. The Defaults Record contains a variety of items that are used to define how the system functions, how data is displayed, or provide a default value if none is provided. For multi-branch systems, it is also possible to enter branch specific data.

Select menu options:

- Work Order Processing
- File Maintenance
- Work Order Defaults Maintenance

A sample of the Work Order Defaults Maintenance screen is shown below.



The screenshot shows the 'Work Order Defaults Maintenance' screen. At the top, there is a 'Hot Menu' bar with the Amador logo and several navigation icons. Below this, the main form area is divided into several sections:

- Branch Selection:** A dropdown menu showing 'AMD - AMADOR, MAIN BRANCH'.
- Work Order Defaults:** A dropdown menu showing 'W01 - MAIN Workorder Branch'.
- Personal:** A dropdown menu showing 'Personal'.
- Location:** Text boxes containing 'EDMONTON' and 'AB'.
- Phone Number:** Text boxes containing '780-###-####', '780', and '999'.
- Time:** Text boxes containing '17', '12', and a dropdown menu showing '2 - 1/4 HR'.
- Accounting:** Text boxes containing '000', '000', '999999', '?', '0010', '0151', '999', and '99'.
- Dates:** Text boxes containing '7/29/07', '7/28/07', and '7/28/07'.
- Category:** Text boxes containing 'LAB', 'REG', and '?'.
- Subcategory:** Text boxes containing 'SUB' and '?'.
- Code:** Text boxes containing '003' and a 'Save' button.

On the right side of the form, there is a list of checkboxes and dropdown menus:

- Core Detail?
- Separate Pricing?
- License Default?
- Quote Authorization Text?
- Use Quotes?
- Print Country Code?
- Timekeeping? Number
- Online
- Shop
- Percent
- 15.00
- SS

### **BRANCH ID**

Enter the 3 character Branch ID that you wish to establish in the Work Order System. Your current branch status is shown at the bottom of the screen as DEFAULT. If you wish to select this branch, press [NEWLINE] and the system will enter this Branch ID for you.

### **WO BRANCH ID**

Enter the 3 character Branch ID previously created in Branch Maintenance that will be used to link the Work Order System to End of Day procedures in *AutoPoint*<sup>®</sup>. If this Branch is a valid branch in Branch Maintenance, the Branch Name will then be displayed beside the Branch ID, otherwise the statement \*\*\* NOT ON FILE \*\*\* will be displayed. The WO Branch Id is used to obtain a unique invoice prefix.

### **ACCOUNT TYPE**

This is the default type to be assigned when creating a new customer account. This indicates whether the account is Corporate or Personal. This distinction is important when you are entering customer information and is discussed in more detail in that section. If you are a retail shop, in most instances, you would enter <P> for Personal Accounts. If you are a heavy truck or machine shop, in most instances you would enter <C> for Corporate Accounts.

### **CITY**

If all, or a vast majority, of your customers are from the same city, you may enter the city here. Any time the city is required in the Work Order System, if you press [NEWLINE], the system will automatically enter this default city.

### **PROVINCE**

If all, or a vast majority, of your customers area from the same province or state, you may enter the 2 character province or state code here. Any time the province or state is required in the Work Order system, if you press [NEWLINE], the system will automatically enter this default code.

### **POSTAL CODE**

This section is not applicable at this time, but when available will supply the default postal code or ZIP code.

### **PHONE NUMBER FORMAT**

This is where you enter the formatting for display purposes (e.g.: (780)###-####). Characters such as brackets and dashes are displayed/printed in that position. Numbers are used to supply defaults if no value is provided. The # sign is used to indicate that a number should be placed in that position. Using the sample above, if you enter 4211111 as a phone number, you would have displayed (780)421-1111.

### **COUNTRY CODE**

If all, or a vast majority, of your customers are from the same country code in the telephone system, you may enter the country code here. The country codes are normally listed in the information section of your telephone book. The country code for Canada and the US is “1”. This code will only be printed on invoices and quotes if the “Print Country Code?” option is set to <Y>es. Maximum 3 characters.

### **AREA CODE**

If all, or a vast majority, of your customers are from the same area code, you may enter the area code here. Any time the telephone number is required in the Work Order System, if you do not enter the area code it will be added from this default.

### **PRINT COUNTRY CODE?**

<Y>es if you want the country code to print on the invoice.

<N>o if you do not. The telephone number including the area code but not the country code will print.

### **LICENSE NUMBER FORMAT**

Indicates the formatting style of basic license plates in your jurisdiction. For example, if your license plates are usually 3 letters followed by a space followed by 3 digits (e.g. ABC 123) you would enter <XXX 999> with ‘X’ representing letters and ‘9’ representing digits. This is for formatting license number fields only. If the license number entered is 3 letters followed by 3 digits (no spaces), the formatting above will apply. However, if a vanity plate or a plate which does not follow that pattern (ex. a commercial plate) is entered no default formatting will be done to the field. Maximum of 10 characters.

### **VIN SIZE**

This is a numeric field to identify the maximum number of characters in the VIN (Vehicle Identifier Number). Value must be between 17 and 25.

### **COMPONENT SERIAL NUMBER SIZE**

This is a numeric field to identify the maximum number of characters in the serial number for components. Value must be between 12 and 20.

### **TIME RECORD**

The Work Order System will use this to determine the rounding of labour entered. Enter <1> for 10<sup>th</sup> of an hour or <2> for 1/4 of an hour rounding. All labour entered in the Work Order System will then round based on this default. Note that this is not the same as the time format in the Time Control record.

### **TIMEKEEPING**

Indicates if you are using the timekeeping system in Work Orders. The default for this is <N>0.

### **LINK**

Indicates how the time records are to be linked – to the request code or the request number. Enter <C>ode or <N>umber. Enter [NEWLINE] to accept the default value of “N”.

### **CUSTOMER NUMBER RANGE**

The Customer Number is a unique 6 digit number to represent the retail customers. A range of numbers is assigned here which can be used to distinguish shop customers from regular *AutoPoint*<sup>®</sup> customers. Enter the first 3 digits of the beginning and ending of the customer number range. For example, if you enter 800 to 899, the customer number range will be 800000 to 899999. If you enter 000 in each field, no separation of customers will occur.

### **CASH CUSTOMER NUMBER**

This is the account number you use for retail customers who are not assigned credit status. Each branch within the Work Order System must have its own Cash Customer Number. This may be the same number that is assigned to the cash customer in the *AutoPoint*<sup>®</sup> branch record.

### **NEXT QUOTE NUMBER**

This is the next available Work Order Quote number.

### **NEXT REPAIR ORDER NUMBER**

This is the next available repair order number for the Work Order System. This number is also used as the invoice number for the repair order.

### **QUOTE EXPIRY**

The number of days to quote expiry. Set this field to the number of days before a quote expires. Setting this to 999 will allow no expiry for the quote.

### **\*PROCESSING STAGE**

This information is never entered by the user unless directed by a support representative. It is the stage end-of-day processing has reached.

<0> indicates the processing completed.



**WARNING:** Any other number indicates the stage at which it stopped. If there is anything other than a zero here, call your product support center.

<1> indicates that the Next Business Day has been updated as the Current Business Day in Branch Maintenance. If for some reason End-of-Day does not finish and it must be restarted, the system does not ask for the Next Business Day again. It continues from where it stopped and prints the reports again.

<2> indicates that for a remote site “Yes” was entered to “**Create a Log File?**” If for some reason End-of-Day does not finish and it must be restarted, the system continues from where it stopped and reprints the reports. For on-line sites, “Yes” was entered to “**Update Files?**” The system begins updating AR Open, AR Distribution, Sales History, Purchase Order Recommendations, and Backorders. If End-of-Day is restarted, the date is not asked for, the reports do not reprint but the system asks to Update Files again.

<3> indicates “Yes” was entered to “**Update Files?**” The information entered for the current business day is added to the permanent files and the working files for that day are being deleted. If End-of-Day does not finish and it must be restarted, the system does not reprint reports, it continues processing from where it stopped.

**\*EOD**

This field automatically displays the terminal number of whoever is currently running EOD processing. If the number is **99**, it means that EOD is not currently being run. If it is any other value, EOD is currently being run.

**\*CURRENT BUSINESS DAY (MMDDYY)**

The only time a date is entered is the day you begin using your Work Order System. After that time, the system automatically updates this date when end-of-day is processed.

**\*DATE LAST PROCESSED (MMDDYY)**

This is the last business day for which the End-of-Day process was run. This is automatically updated by the system.

**\*DATE LAST COMPLETED (MMDDYY)**

This is the last business day for which the End-of-Day process was completed properly. This is automatically updated by the system.



**WARNING: NEVER CHANGE THE DATA IN THE FIELDS WITH A “\*”**

**ABOVE!!** If the information in any of these fields is incorrect for any reason, please call your product support center immediately.

**LABOUR ABBREVIATION/PART NUMBER**

This labour part will become the default labour part when entering labour in the Work Order System. It can be overridden either by the labour part number assigned to a request code or by selecting a different labour part upon entering the information.

**SUBLET PRODUCT LINE**

This indicates the product line to be associated with all sublets in the Work Order System. All sublet “parts” **must** use this product line.

### **INVOICE PREFIX**

This prefix prints before the actual invoice number. It is especially useful to distinguish invoices from one store with those of other stores in a multi-branch environment. It is recommended that the invoice prefix for the Work Order System be different from the invoice prefix assigned for the same Branch ID in the Branch Maintenance file.

### **PRINT WARRANTY INVOICES**

This indicates whether you want warranty invoices to be printed “On-line” at the time its associated customer invoice is printed, or “Batch” during End-of-Day procedures.

### **CORE DETAIL**

When a part that has an associated core is entered on a work order, this indicates whether you wish to have details of the core printed on the invoice.

### **SEPARATE PRICING**

This indicates whether you will be making use of the customer’s retail pricing as set up in *AutoPoint*<sup>®</sup>. If you enter “Yes” then the customer pricing *AutoPoint*<sup>®</sup> is used (e.g. flyers). If you enter “No” then only the price field in the Work Order Customer Extension record is used.

### **LICENSE DEFAULT**

This indicates whether you want the VIN to default to the license number if no license number is entered. This is currently set to <Y>es in all cases.

### **QUOTE AUTH TEXT**

This indicates whether you want the authorization text to be printed on quotes.

### **USE QUOTES**

This indicates whether quotes are allowed. This is currently set to <Y>es in all cases.

### **INDUSTRY FOCUS**

This indicates what type of business you have. Options are <R>etail, Heavy <T>ruck or <M>achine Shop. If <T>ruck is chosen, the 'In Service' field is displayed and printed.

### **S/S BY PERCENT OR AMOUNT**

This indicates whether you want shop supplies, by default, to be calculated as a percent of the labour charge, or a fixed amount. In most cases percentage will be chosen. You may change this as each labour item is entered.

### **DEFAULT PERCENT**

If shop supplies are defaulting to being calculated by percent, this indicates the default percentage to be used in the calculations. This will also be used in automatically calculating the shop supplies amounts for any labour charges in predefined requests. If shop supplies are defaulting to a fixed amount, this will be zero.

### **DEFAULT PRODUCT LINE**

This is the default product line to be used to distribute the shop supplies charges .

Should you have any questions, concerns or need clarification on any of the above please contact Customer Care at 780-483-2727 or 1-800-661-2727.