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Audatex

TeamWork is the only system to have a working and sanctioned interface with Audatex.

You do not have to retype the Audatex Listings which assessors send you - simply ask them to email it to you and your TeamWork system will automatically convert it into a DR.

Click here for more info <http://www.tmsteamwork.co.za/Teamwork.htm#Auatex> OR give us a call (011-4822161)

Auto Insert items into the quote

Do you know that you can set certain items to be automatically inserted into the quote when you create the new DR?

To see how this feature works, select System Maintenance -> Description Tables -> Enter Parts Descriptions. The "Parts Descriptions" table will appear. Click on the "New Description" button and then click on the blank line which appears at the bottom of the table. In the "Code" column, type RP and press the tab key. Under the Description column, type Rust Proofing and press the tab key. Under the Price column, type 150 and then click in the Auto Insert column. Make sure that a tick appears in the Auto Insert column – this is what makes the info we just entered appear as a default in the quote!!

Press the Close button and create a new DR. When you go into the quote page, you'll see that the Rust Proofing appears as a default in the first line of the quote.

If you have any questions about this function, give us a call.

eMail PDF forms directly from TeamWork

Do you know that you are able to email ANY document from TeamWork directly from the Printing Page?

Open an RO, right click to access the Print Menu, select any option to print and once the Print Page appears click the "eMail as PDF" button at the top of the page. This will convert the document on the page into a PDF (Portable Document File) file and attach it to an email for you to send. All PDF files are read by the Adobe Acrobat Reader which forms part of most Microsoft Windows installations.

If you need any help, give us a call (011-4822161).

eMail photos from Teamwork

Do you know that you are able to email photos directly from the DR/RO?

To see this function, open a DR or RO file with photos in it and select the Photos page. Click on any photo and you will see a red border appear around it to show it has been selected to email. To de-select it, click on it again and the red border will disappear. You may select multiple photos to email and once you are ready, click on the “eMail selected photos” button. TeamWork will group the photos into a ZIP file and ask you where to email them off to – type in the “To” address and press Send.

If you need any assistance with this (or other functions), please give us a call. (011-4822161)

General Search for DR/ROs

Do you know the easiest way of finding a DR/RO file?

TeamWork keeps the DR/RO files in one of three filing areas :- either as a DR or an open RO or a closed RO. If you are not sure of the status of a particular file, this means you need to search in all three places to find it. But – if you select on the “General Search” button (top right hand side of the Main menu Screens) Teamwork will automatically search all three areas for you.

If you need any help, give us a call (011-4822161).

Job Card 1

Do you know that you have full control over the information which appears on your job card?

To see some of the functionality of the job card, open a RO and select the J.Card page. This will reflect the information from your quote. The “ticks” which appear in the various columns show that you have quoted for that particular operation.

If you take the “tick” out of any particular operation it will not be printed on the job card! The “Rep New Part” column has a greater significance and is best demonstrated by example.

On your J.Card page, find a line which has the Parts column ticked and click in the “Rep New Part” column – make sure a “tick” appears.

You have now told TeamWork that you wish to repair the part, rather than replace it. This will NOT affect the quote or the invoice –but – it will affect the parts ordering and the job card. If you select the “Parts Ord” page, you will see that this particular part does not appear for ordering AND if you print the job card, the operation will no longer say “New”, but will now say “Repair”. If your Job Card does not display ANY operations, please watch for next week’s Tips & Tricks where we will discuss the information layout of the job card.

Job Card 2

Continuing last week's discussion on the Job Card :-

If you don't want the workshop to see the quoted times for each operation, select System Maintenance -> System Defaults -> (password). Once the Defaults input page appears, take the tick out of the "Print Hrs on Job Card" field (bottom left hand side of the page) and close the page.

NOW FOR THE FUN BIT.

Open a RO and select the Rates/Dsc page. Press the "Load Defaults" button and the Target Time and Target Money fields will be populated with the current quoted values. You may now alter the target times and whatever value you put in WILL APPEAR ON THE JOB CARD!! Also, whatever name you enter in the "Assigned" fields will appear on the job card.

If you need any help, please give us a call (011-482 2161)

Job Card Targets

Do you know that you are able to set time targets for the various labour categories on the jobcard?

To set the targets for the workshop to meet, open an RO and select the Rates/Dsc page. Press the "Load Defaults" button and the quoted values for time and money will appear in the Target columns which you can then adjust. Whatever values you enter will be printed on the jobcard for the workshop to see. If your system is printing the detailed times next to each operation, it may be best to change the setup to prevent this. Select System Maintenance -> System Defaults and de-select the "Print Hrs on Jobcard" option at the bottom left of the page.

If you need any help with this, please give us a call (011-482 2161).

Customising the TeamWork Logo

Do you know that you can customise the logo picture on the TeamWork main menu page?

Create the picture you would like to have and save it as "LOGO.JPG" (without the inverted commas). Then copy the file into \teamwork\data in the server. The next time you open TeamWork, this will be the "centre piece" on the main menu. I'd like to suggest that you use a company logo, but, use whatever blows your hair back

If you need any help with this, please give us a call (011-482 2161).

How to do a month end

All right – enough of the holiday mode.

If you are not totally sure of how to do the Month End procedure in TeamWork, click on “About” (top right hand side of Main Menu) and select “How to do a Month End”. If the instructions laid out are not clear enough, please give us a call.

No Part prices on the Parts List

Do you know that you are able to stop the part prices appearing on the RO Parts list?

To see this feature, open an RO, right click and open the Print Menu. Select the “Parts List” and when the option to print “Per Supplier or Global”, remove the tick below the “Global” – its marked “Print Prices”. The resultant print out will not include any prices on the parts list.

If you need assistance, please give us a call (011-482 2161).

Parts Labels

Did you know that TeamWork can print labels for you to stick onto delivered parts?

Open any RO, right click to open the Print Menu, click the "Parts Labels" button (6th from the top) and a 8x3 label "layout" will appear. Select the position of the labels to print and click the Print button. The system is designed to work with the "8x3 laser label" available from any stationery shop.

If you need more info, give us a call (011-482 2161).

Passwords

Do you know that TeamWork has various levels of passwords to help protect your data security?

In order to access the password list, select “System Maintenance -> System Defaults” and enter the Admin Password. The password list is at the bottom left hand side of the screen. The passwords form a critical function of TeamWork and must be kept confidential at all times. PLEASE NOTE THAT WHOEVER HAS THE ADMIN PASSWORD ALSO HAS ACCESS TO ALL THE OTHERS!!

If you need any assistance with this function, please give us a call (011-482 2161).

Smartex

Do you know that Smartex has been made available for use again?

Many shops have grown tired of compiling and emailing the K&S Smart report every week, so we have re-launched the Smartex application. Smartex will automatically

compile and email the necessary information directly to K&A Smart without you ever having to remember. There is a cost implication, so please call us for more information (011-482 2161).

SMS

Do you know that there is only one correct way of entering the customer's cell number on the DR/RO front page? Do not put any spaces in the cell code or number. To see the reason for this, open any DR and type in the customer cell code eg 082 and then the number with a space – eg 123 4567. Now; right click and select Print Options. Press the “Send an SMS“ button (bottom right hand side) and take note of how the cell number appears in the “Cell Number” box. Eg 082123_456. This is an invalid cell number and the SMS will not be sent to the customer. In TeamWork Ver 6.3, we will attempt to automatically correct this, but for the current version, PLEASE DO NOT PUT SPACES IN THE CELL NUMBER.

If you are not yet using the SMS facility, please give us a call to set it up for you.

By the way – TeamWork Ver 6.2 was released yesterday. If you have not received it, please give us a call and we'll re-send it.

SMS – Remindex

Provide the service your customers expect WITHOUT extra work on your side :-

SMS: Save Time & Costs by sending SMS messages directly from TeamWork to customers on the progress of their vehicles. REMEMBER Land to Mobile calls are very expensive - R2.00 the first 60 seconds & thereafter R1.00 every 30 seconds. An SMS costs 70c

Click here for more info: http://www.tmsteamwork.co.za/SMS_Sending.htm

Remindex: An important tool to ensure that promises made to customers are kept by activating “pop-up” reminders on employee's computer screens.

Click here for more info: <http://www.tmsteamwork.co.za/Remindex.htm>

Write off a vehicle

Do you know how to “write off “a vehicle in TeamWork?

If you have done a write off quote, the simplest way of “zeroing” the value without losing the quoted information, is to select the Totals page on the DR/RO and clicking on the Write off box under the totals. This will then place the negative total in the last line of the quote, effectively “zeroing” it. If you wish to reverse the “zero” effect, simply take the tick out of the box, delete the last line on the quote page and the DR/RO total will be back to normal.

The Write off box is password protected – to enable it, please enter a password under System Defaults.

If you have any questions about this function, give us a call.

Export data to Excel spreadsheets

Do you know that any report from TeamWork may be exported to a Microsoft Excel Spreadsheet?

This function is best demonstrated by example, so please click on the following link

http://www.tmsteamwork.co.za/Smartex.htm#Smartex_XLS

Although this example shows how to convert the K&A Smart report into an Excel file, the same logic applies to any document printed out of TeamWork.

Most accounting systems will import data in an Excel format, so this function may help you with the month end procedures.

By the way – our Smartex system has been re-released, so, if you are tired of sending K&A Smart data every week and would like it to be done automatically, please give us a call.

Zoom Photos

Do you know that you are able to zoom into any photo you load into a DR/RO file?

To see this function, open a DR or RO file with photos in it and select the Photos page. Click on any photo and it will appear in the large box on the right of the page. Double click on this large box and the print photo screen will appear. Now, here's the trick :- look at the top left hand side of the page and you should see three icons that look like a page. Click on the third icon and the zoom function will activate. Each time you press this icon it will zoom deeper. To undo the zoom, click the second icon (it has two small blue arrows on each side of it).

If you need any assistance with this (or other functions), please give us a call. (011-4822161)

Archiving

By now you should be on Ver 6.3. This upgrade has a wealth of features which we will go through in detail over the next few weeks, starting with the Archiving feature :-

TeamWork keeps access to every DR and RO you have ever created, so, as time goes by your reporting will slow down. The Archive feature will move CLOSED ROs which do not have any money owing OR parts on backorder into a separate database. This means that they will no longer appear in your Closed RO Listing, and if you ever need to access them again you need to DE-archive them.

There are two ways to archive old ROs – bulk or individual. The bulk option is found under the System Maintenance -> System Defaults and will archive ROs closed between a selected date range. The individual Archive option is under Closed Repair Orders -> Review Closed Repair Orders. Select the RO you want to archive and then click the Archive button (bottom left hand side of the screen). The RO will move from the Closed RO list into the Archive database.

To DE-archive a RO, select Closed Repair Orders -> De-archive a Closed RO. Select the RO you want to de-archive and then click the De-Archive button (bottom left hand side of the screen). The RO will be moved back into the Closed RO selection list.

If you need any assistance with this function, please give us a call.

By the way, it has been reported to us that Ver 6.3 does not display the extra labour on the new layout of the Insurance Costing Sheet. If you are actively using this function, please give us a shout and we'll send you Ver 6.32

Audatex Import Problem

Every time you import an Audatex quote into TeamWork, the two systems exchange information via an export file, but, for some reason this file is not appearing in its usual format from Audatex. This means that TeamWork is not able to read it correctly and cannot do the usual interface. Both TMS and Audatex are trying to work out the solution, but, in the meanwhile there is a PLAN "B".

If you are using the TMS/Audatex interface module and are experiencing problems, please give us a call and we'll explain how to get around the issue. (011-482 2161)

The Bin function

Another power feature of Version 6.3 :- THE BIN !

Each DR/RO file now has a "bin" attached which allows you to save ANY file in it. To see this in action, open any DR and click on the Notes page. The large white block on the left hand side is the Bin. To save a file in it, Right Click and select the "Import File to Bin" option (at the bottom of the menu). From here you can navigate to anywhere on your hard drive (starting at "My Documents") and once you find the file you want to save in the bin, simply double click on it. The "File saved in bin" message appears and when you click on OK, the file name will appear in the bin.

For the more advanced user, you can simply drag any file into the DR/RO folder and it will be saved in the bin.

In order to open any of the files in the bin, simply double click on them and Windows will open them with the appropriate application.

The bin feature means you can save DOC files, emails, JPG files, XLS files, in fact ANY FILE AT ALL in the DR/RO. The complete history of the vehicle can now be kept

together and if you ever accidentally delete the original, the copy will always be available!

If you need assistance with this function, give us a call.

Damage Report Quote Pads

Do you know that we supply Quote Pads that fit the format of the Quote Page in the DR file? Check out the attached scanned sample to see what it looks like.

The DR Pads have 100 pages each and are sold in packs of 5 pads for R 182.24 (INC VAT). We ship them country wide, so give us a call to place an order (011-482 2161).

Invoice Comments

I'm sure that you know that you can put a comment on the Insurance Invoice simply by typing in the Invoice Notes on the RO Notes page, but, do you know that you can put in a "permanent" comment in as well?

From TeamWork's Main Page, select "System Maintenance" -> "Edit Invoice Comments". Here you are able to enter comments which will appear on ALL Insurance and Excess invoices.

Private Notes Password

Here is some more from Ver 6.3 :-

The Private Notes function is now password protected, but you need to activate the password (call us if you don't know how). Once the password is activated, anybody who clicks on the Private Notes box will be asked for the password. If they have it, they will be granted access to the notes. If they don't have it, an Input Box will appear. They can type whatever they want into the Input Box and when they click OK, the data will be added to the Private Notes. In other words, anybody can add to the Private Notes, but only those with the correct password can actually access the notes to edit them.

If you have any queries with this function (or others) please give us a call 011-482 2161.

Quote Disclaimer

Do you know that you are able to change the quote disclaimer (the bit at the bottom which says you aren't responsible for anything).

Select System Maintenance -> Edit Quote Disclaimer and enter whatever you want to appear at the bottom of every quote. Simple.

Selection Screen Sort Order

More stuff from Ver 6.3 :-

Do you know that you can change the sorting order of the various columns in the DR/RO selection screen? If you click on the DR, RO or DR Date column headers, the selection

screen will be resorted to your selection. Click the same column header twice and the order will change from ascending to descending and back again.

If you need help with this (or any other) function, please give us a call (011-482 2161)

Speedshop System

We have two items of interest this morning. The first is the development of the TeamWork SpeedShop system. If you are thinking of opening a speed shop, please give us a shout and we'll explain how it goes together.

The second thing is that we are not going to be open on Monday – however – we will keep the following cell phones close to hand :- 072 527 8835 and 072 527 8865