

BGOffice Vehicle Management Option

Frequently Asked Questions

How do I enable the Vehicle Options in BGOffice

Under Maintenance, Program Settings, Manage Vehicle Options.

How do I add a vehicle?

*Create a customer if not on file,
Open the Customer Master Record,
Select the 'V' button
Select the 'Add' button from the Vehicle Browser screen*

How do I find a vehicle?

*Select Customers, Vehicles. Use the scroll bars to locate the registration number.
Double click on the selected record (or select Display) to open the master vehicle record.*

How do I find a vehicle when I know the customer?

*Open the customer master record, select the 'V' button to open the Vehicle Browser.
This will display only those vehicles that belong to that customer.*

How do I invoice a vehicle service to a customer?

*Find (or create) the customer and open the customer master record
Select the invoice button. The Vehicle service record screen will open. Select from the drop box or tick 'New' and add the details. Enter the details as necessary. Take Continue, complete the invoice. The details will be saved as a Vehicle Service Record.*

How do I find a vehicle service record?

*Select Customers, Vehicles or open a customer master record and select the 'V' option.
From the Vehicle Browser, select 'Service Records'. If you know the registration, enter it and hit the return key. If you only know the owner or the vehicle make or model, select 'Search' and enter the text that you want to locate. E.g. 'smith' or 'ferrari' or '911' will display all records on file that include that text fragment in their details. From the matching records, you can display the transaction details. Select 'Continue' to go back to the Vehicle Service Records screen and the record you selected will be highlighted.*

How do I set a diary reminder?

Highlight a vehicle in the Vehicle Browser Screen and select 'Reminder'.

Or select 'Reminder' from the Vehicle Master Record.

Or select 'Set reminder' from the Vehicle Transaction Record

How do I access the reminder diary?

Open the Vehicle Browser from the main menu (Customers, Vehicles) or from a customer master record by selecting the 'V' button.

Select 'Open Diary' to display the Diary Reminder Browser.

Use the scroll bars or select 'Print' and an optional date range to preview or print the reminders that fall within those dates.

Use that report to initiate contact with the customers in whichever means you find appropriate - letter, email, telephone etc.

What if my customer isn't the owner of the vehicle?

When you create the invoice you can enter the owner's details separately even though the vehicle is attached to a customer in your customer file.

Invoicing A Vehicle Service Job

Vehicle Transaction Record

Vehicle

REG No: HU8871 New HU8871 RENAULT

Make: RENAULT Reg. Expires: / /

Model: WOF Expires: / /

VIN: Kilometres:

Vehicle Notes Vehicle History Set Reminder

Customer

Account: 1390 3M NEW ZEALAND LTD

Customer: 3M NEW ZEALAND LTD

Address 1: INVOICE ADDRESS 1

Address 2: TAKAPUNA

Address 3: AUCKLAND 0740

Phones:

Email:

Personalise correspondence to ... Dear

Clear Accept

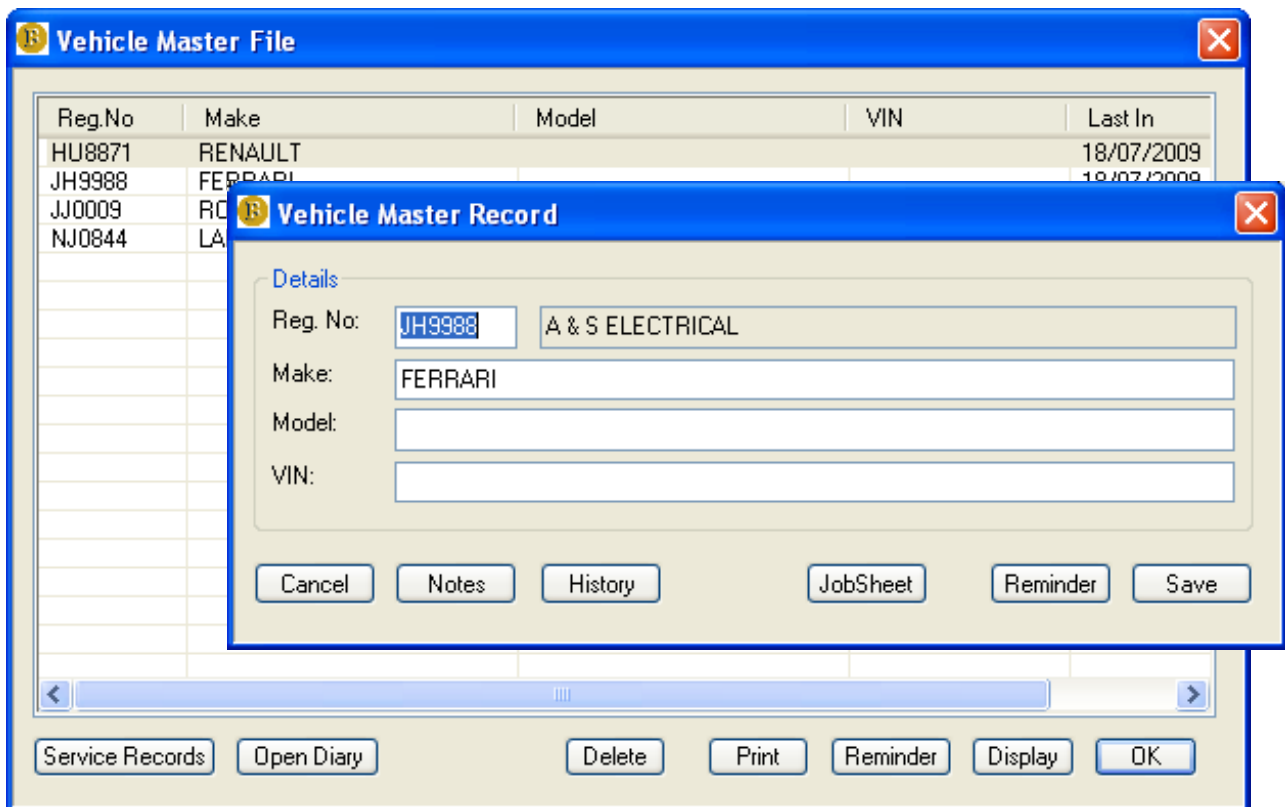
This screen is presented when an invoice (or sales order) is being raised from the customer master record.

The vehicles belonging to that customer will be displayed in the drop box. Select an existing vehicle or tick the 'New' box to create a new vehicle master record.

Complete the details as necessary. Note the ability to identify a different owner than the customer in your system. This is useful for trade customers who forward other vehicles to you for service, or for use with a 'Cash Sales' account to create durable service records by actual owner where you choose not to create a separate account in BGOOffice for that person.

The invoice is completed in the usual way and the record will be created in the Vehicle Service Records file.

Vehicle Master File Browser and Vehicle Master Record



All vehicles (or all vehicles listed against a specified customer) will be displayed
The list will be sorted by registration number
Use the scroll bars to move through the records and select from the button options.

Display (or double clicking on a vehicle record) opens the Vehicle Master Record

Open Diary to access the service reminders

Add – visible if a specified customer's vehicles file has been selected – to create a new vehicle record

Delete to remove the vehicle

Reminder

Sets a diary reminder for the highlighted vehicle

Print

Prints a list of the vehicles displayed to the screen with hardcopy option to selected printer.

Vehicle Reminder Record

The screenshot shows a dialog box titled "Set Reminder". It has a text field containing "JH9988 Reminder", a date field with "18/07/2009", a calendar icon, and five buttons labeled "1", "2", "3", "6", and "12" followed by the word "MONTHS". Below these is an empty text input field. At the bottom are "Cancel" and "Save" buttons.

Allows the entry of a date and a note against the vehicle.
Quick keys are provided for 1,2,3,6, and 12 months future dates.

Vehicle Service Reminder Browser

Date	Reg.No	Reminder Message	Account
18/10/2009	NJ0844	wer	1390

Buttons: Delete, Print, OK

Displays all reminders in date sorted order.
Records can be deleted although the system automatically removes stale records.

Printing allows a date range and allows previewing or printing.
This report is then used to create reminder letters or contact by email or telephone using the details held against the vehicle and the customer. A normal use would involve printing the coming month's diary entries and using the report to collate the follow-up activities

Vehicle Service Records Browser

Reg.No	Make	Model	Date	Inv.No	CustNo	Owner
JH9988	FERRARI		18/07/2009	15775	1368	FRED SMITH
JH9988	FERRARI		18/07/2009	15776	1368	KEVIN

All service records created are stored in the Service Records file and accessed through the Service Records browser.

Entering a registration number will position the browser on the first match of that registration, and all records against that particular registration will be displayed in date order below. Double clicking any record will display the transaction record.

You can also search for any text in any part of the records using the 'Search' button. This is of particular use in searching for an owner, e.g. 'smith' or a vehicle type, e.g. 'hummer'. All matches are presented and each can be opened to display the transaction record itself.

The print option allows an optional date range selection and can be previewed to the screen or sent to any available printer.

Vehicle Transaction Record Screen

The screenshot shows a software window titled "Vehicle Transaction Record" with a blue header bar. The window is divided into two main sections: "Vehicle" and "Customer".

Vehicle Section:

- REG No: [Invoice: 15776, 18/07/2009](#)
- Make: Reg. Expires:
- Model: WOF Expires:
- VIN: Kilometres:
- Buttons:

Customer Section:

- Account:
- Customer:
- Address 1:
- Address 2:
- Address 3:
- Phones:
- Email:
- Personalise correspondence to ... Dear
-

Displays the details that were captured in the invoice when it was created.

The invoice is accessible through the BGOOffice Invoice Archives browser or directly from the customer screen under sales history.