

## 2004-802 – Enter/Edit Vehicles

### Create 'New Vehicle Record'

Open the **Inventory** tab in the Opto ribbon, and then **click** on the 'New/Edit Vehicle' icon.

A Vehicle Tracking number (VTN) will automatically be assigned, which is unique to the vehicle in the database.

- **Click** in the "Emp No" field, **press** <F2> and select the appropriate employee from the pop-up list, then **click** OK.
- **Click** in the "Vehicle Owner" field, **press** <F2> and select from the pop-up list, then **click** OK.
- **Click** in the "Vehicle Make" field, **press** <F2> and **select** from the pop-up list and **click** OK, then **press** <TAB> to display the information.
- **Click** in the "Vehicle Model" field and **press** <F2> and select the model from the pop-up list and **click** OK, then **press** <TAB> to display the information.

Type the colour in the "Colour" field and continue to complete the "Date of Man", "Odometer" and "Hour Meter" fields. **Press** <F9> to save.

The screenshot shows the 'Vehicle Management - <New Entry>' window. The ribbon at the top has 'INVENTORY' selected. The 'New/Edit Vehicle' icon is highlighted with a red box. The form contains the following fields and sections:

- Record Detail:** Vehicle Track: 6, Date entered: 27/03/2019, Emp No: 1, Robert JONES
- Vehicle Identification:** Client Code: AUST\_WIDE, Australia Wide Transport, Reg No: 123ABC, Asset No: 0005, Motor: MC334123546
- Vehicle Type:** Vehicle Make: 1, Mitsubishi, Vehicle Model: 1.2, Trident Ute, Body Style: Extra Cab, Fuel Type: PETROL, Transmission: MANUAL
- Vehicle Notes:** Date of Man: 01/01/2019, Odometer: 000081, Hour Meter: 2.00
- Part:** Part Code: [empty]
- File Attachments:** A table with columns Description and Filename. The first row is 'Warranty' with filename 'L:\Vehicle Management\Trident\Warranty Information'.

**To attach a document** to the Vehicle Management Record, click on the first available line in the "Description" column and type in a description of the document you wish to attach, **press** <TAB> to advance to the "Filename" area.

**Press** <F2> and browse your computer for the document you wish to attach, **click** on the document to highlight and **click** on **Open**. The filepath is now in the "Filename" area. To view the attached file, **click** on the line of the document you wish to view to highlight it, then **click** on the **View attached File for this Vehicle** button. **Press** <F9> to save.

To edit the vehicle details, open the 'Edit' Vehicle window, **click** in the "Vehicle Track No" field and **press** <F2> to display pop-up list and **select** the required vehicle, **click** on OK.

## Assign a vehicle to a new or existing Sales/Production order.

Open the **Orders** tab in the Opto ribbon, click on the 'New Sales Order' icon and enter order information as per normal.

To assign the vehicle to the client order, **click** on the 'Attachments' tab, **click** in the "VIN No field" and **press** <F2> to show pop-up list of all vehicles and **select** the vehicle designated for this Sales Order. **Press** <F9> to save when completed.

Sales Order - <New Entry>

Order No: 50153 Client Code: AUST\_WIDE Client Name: AUSTRALIA WIDE TRANSPORT

Details More Info **Attachments**

File Attachments

Description	Filename	Email	Print
1			

Kit	Qty	Pos
1		

Emp: Emp Name %

Owner ID: 2 Larry Moreton

**Vehicle Details**

7 Pin Flat  7 Pin Round  7 Pin Round Large  12 Pin Flat  USA Spec  Euro Spec

VIN No: 6 vn53245685

To add a vehicle to a production order (new/edit) select the 'Review' tab as below, **click** in the "Vehicle Ref" field then **press** <F2> and select the relevant vehicle from the pop-up list and **click** OK.

Edit Factory Order

Order No: 1194 Client Code: BADGER Client Name: BADGER MINING PTY LTD Contact Name: Type: PR

Details Sub Parts More Info **Review** Despatch Desp Info Allocation QMS/Notes

Topic

Suggested Action

Action Taken

Resolved

Owner ID: 1 Robert JONES

**Vehicle Ref:** 1

Order Review (Released)