Autoline Release Notes

Revision 8.30.8273

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Introduction

For each new release of the ADP Autoline system a set of release notes are compiled to provide information about enhancements and features.

> **Note**: The notes in this document are incremental and therefore only cover the changes and enhancements that have been programmed since the 8090 release. If your upgrade spans multiple releases, the previous release notes can be requested from your account manager.

The 8273 ADP Autoline Release implements a number of feature enhancements and functional improvements. The most significant enhancements are listed in the Developer's Notes (8273 Enhancements).

Icons have been included to highlight the following:

: Enhancements that may require further training.

: Enhancements that require parameter, system utility or configuration changes.

System Requirements

- **KClient version used for KCC testing** - version 06.00.52.9065 - or newer
- **KCML upgrade used for KCC testing** - version 06.00.52.9065 - or newer (Required for Front Page functionality)
- Licence upgrade to include an Autoline Unrestricted licence
- **PCDB** (Postcode database) upgrade to version that recognises L changes to allow for 10 digits. (Required to start PC daemon)
- To use **KCBT**, a KCBT viewer is required on all client PCs concerned.
- KClient setup file and KCML IMAGE files for all operating systems can be found on **http://www.kcml.com/products/motortradekcml/Rev8-30-8273/**

> **Note**: For systems using a non-standard back-up method that creates a token file in /tmp on completion of the back-up will need to be aware that the system now uses $WORKSPACE instead of /tmp. Please refer to your Technical Consultant to ensure that changes have been made to accommodate this.

Document Scanning

The computer you use to scan documents must have KView installed. Ensure the scanner is attached directly to the computer doing the scanning and that the scanner software is installed on the same computer.

> **Note**: There are conflicts between certain types of scanner and KView. These include the HP6300C and the Fujitsu Scanner M3096GX.

SMS Text Messaging

> **Note**: The 8273 release of Autoline supports SMS text message sending.

The requirements for SMS text message sending are as follows:

Hardware:

- KPrint server.
- GSM modem connected to the KPrint server.

Software:

- On the KPrint server create a KPrint queue for the SMS printer.
- In Autoline, within the printer map (GB.prins) a KPrint printer record is required. This printer must have the Unix device set to sms@111.22.33.4 LPD=Y (where 111.22.33.4 is the IP address of the KPrint server). In the UserEnv.txt file set **ENV("SMS") = "SMS"** (where SMS is the printer name within the GB.prins table).

Menu Items and Functional Changes

New Menu Items in 8273

Below is an overview of many of the new menu items added to the 8273 software. Click the hyperlinks for further enhancements in that particular module.

Global Module

- (QA36088/912) New routine to allow a local print or spooled print to be released to the printer without having to exit to the menu. Simply call gb_release_printer.

Nominal Ledger

- **QA33242/761** The withheld daybook reason code Maintenance option moved from the Nominal Ledger Miscellaneous Menu to the ADP Utilities menu.
- **QA36854/9809** Add/Modify trans summary priority changed to 9 on NL System Maintenance Menu.

Purchase Control

- **QA31548/6823** *Allow Franchise Mask*. With this tick box checked, a franchise mask field is displayed, allowing the user to enter/select the franchise codes of parts to be listed under the Selection menu.

Purchase Ledger

- **QA30774/627** New facility to generate and print documents in PL to allow dealers to generate self billing invoices in the purchase ledger for sub-dealer warranty claims, vehicle commissions etc. Item on the menu to be titled *Self Billing Invoices*
- **QA32099/673** New standard postings facility, similar to standard journals in NL.
- **QA33291/700** Separate PL area codes lookup table, ensuring PL add/modify accts uses this instead of SL.areas.

Point of Sale

- **QA36023/663** The TAG valuation screen will now display the Labour/Parts and Consumable values separately and the consumables can be printed onto the invoice using a new derived field. Create a WIP and load Consumables via the Menu bar option Tools.

System Utilities

- (QA43363) A new option to access these Release Notes has been added to the Utilities menu. All users with priority 8 access to the System utilities module will be able to view, as an html document, the Release Notes that contain enhancement information relevant to the system they are running.

Vehicle stock books

- (QA22399/0) Stock reports menu priority updated from 1-5.

Functional Changes

The following are the most significant changes:

Global Module - New Audit Facility

(QA37039) New database auditing functionality. This option allows you to audit the changes made to the database within specific functions.

Marketing - Output correspondence as E-mail or SMS text message to a mobile phone

QA34145 New options have been added to allow a user to output customer correspondence as E-mail or SMS text message to a mobile phone. This includes new letters types in marketing record maintenance to define between the preferred contact types when running campaigns and reports.

Warning: This enhancement may affect your user defined letters. Please check the selection criteria of your reports to ensure that the changes to the letter types within the customer record are incorporated.

Developer's Notes (8273 Enhancements)

The Developer's Notes chapter contains an inventory (listed by module) of significant enhancements and updates since the last release.

Accounts

Asset Register

QA33059/748 - When in a divisional company (the related NL company is a divisional pseudo company) and the 'Force divisional period close' NL system parameter is switched on, use the divisional period/year to drive the posting dates in AR/AJ rather than the global NL system parameter period/year.

General

QA36286/0 - Entry of account codes allowed without a separator. Assumed rightmost portion is expense code and remainder is cost centre.

Note: This does not apply to Latin systems.

QA36381/573 - A new facility to send statements (via KPrint only) as a mixture of print, fax and e-mail.

Note: If this is combined in a single run the e-mail should be done as an attachment due to the formatted nature of this sort of document and the width functionality on mail client software.

Nominal Ledger

Q30469/629 - A reconciliation reference to Manual Bank reconciliation has been added to which the user can enter a reference such as the bank statement code or some other reference that can subsequently be used to group all of the reconciled items for reporting and analysis purposes. A new field C20 field - RECREFER - Reconciliation reference will be added to the nominal ledger transaction file and prompted for in the overall selection criteria below the account and cut-off date.

QA31082/493 - The display priority functionality held on Expense codes has been added into the Adhoc Enquiry facility. Use this priority both for display and print Adhocs.

QA31422/672 - The ability to enter a Customer/Supplier Ref equivalent to that held on SL/PL transaction records has been added to all Nominal Ledger Journal functions . This additional field will be held in the NL trans file and all related files.

QA33242/761 - The withheld daybook reason code Maintenance option has been moved from the Nominal Ledger Miscellaneous Menu to the ADP Utilities menu.

QA33805/743 - New printed confirmation of successful verification to include the date and time of the verification. Do not print this message when running the verifies via the Timed operations agent. This applies to all verification programs.

QA34020/848 - When the user attempts to close Nominal Ledger period and there are Sales or Purchase Ledger companies that have not been closed, a grid will show EVERY SL and PL company that is not closed. [I.e all the companies that are stopping the NL from being closed can be viewed at once] Previously only ONE SL/PL company was shown, so the user would have to close that company, then attempt to close the NL only to find that another SL/PL company still was open.

QA34039/762 - Non-kcc users cannot edit VAT period end dates when closing a VAT year. Incorrectly edited dates causes VAT verification errors that can only be resolved by KCC.

QA35960/559 - New alternative methods of Journal posting based on a grid style input allowing Debit/Credit entry and default contra account, held on the Expense Code records. The control of which style of journal being used is controlled by a System Parameter.

QA35301/688 - The Group consolidation facility has changed to support consolidation down to transaction level, as an alternative to divisional accounting, for group financial reporting. Support for consolidation to any company number from any company, by specifying the 'consolidation' company as a system parameter of the *source company*. Allow posting of journals only within a consolidation company. In the consolidation company the source NL company has been added to all of the transaction files, TRANS. ATRAN and OTRAN.

QA36218/705 - All the prior year adjustment functionality has been removed as it is no longer required with the introduction of Prior year Journals.

QA36282/0 - Improved accelerators and layout within Bank reconciliation. The grid now responds to the keyboard as well as the mouse. Also added a run total to the screen.

QA36435/9480 - The grid edit function for maintenance of Suffix Lookup tables has been replaced with a proper maintenance window with validation of the necessary fields.

QA36854/9809 - Add/modify trans summary priority has changed to 9 on NL System Maintenance Menu.

Purchase Ledger

QA30774/627 - New facility similar to Generate and Print documents in PL to allow dealers to generate self billing invoices in the purchase ledger for sub-dealer warranty claims, vehicle commissions etc. Item on menu to be titled *Self Billing Invoices*.

QA32099/673 - New standard postings facility, similar to standard journals in NL. Unlike Default Postings, Standard Postings can be used against any SL/PL account. Added edit box in Batch Input, for user to enter 8 char Std Postings code for doclines.

QA32222/689 - A facility has been provided to amend due date in display accounts, according to priority to amend date in batch input.

QA33027/0 - New withheld reason and branch in PL report ID K81. This report details outstanding items in the PL, and the withheld reason in this context is the explanation for the invoices not being authorised for payment.

QA33291/700 - New separate PL area codes lookup table, with assurance that PL add/modify accts uses this instead of SL.areas.

QA33368/741 - New colour scheme on the Allocations grid of the remittance run to green for; selected, black for; deselected and red for; account in debit. Also a refresh button to remove deselected Items from the list entirely.

QA33570/690 - Payments tab added to display accounts and to provide a facility to interrogate payments on both SL and PL. Also added facility to filter payments by payment reference. And also an option, display all transactions to which that payment reference was allocated.

QA33577/821 - Make PL accounts display consistently with SL by adding the same *Followups* option from Marketing button as was added in E8/507 QA 25656.

QA33688/757 - Extend suggested NL code field in invbf, PL trans and atran to 50 characters. [For use with PL Invoice Register Entry].

QA35840/0 - Invoice and Payment values have been extended to 11.2 in PL Report K88. This report shows the documents selected for a Remittance and Cheque run.

QA36182/926 - Within Cash posting: accelerators have improved. Single character accelerators have been added to allocations grid and cursor moves down automatically after any actions. spurious accelerators have been removed and read only fields have been removed from tab sequence. Also added a filter facility in Allocation tab, to allow user to filter by one of the three following criteria: document date, due date and posting date.

QA36279/9489 - Within Invoice register, Pass registered documents, when analysing transactions ensure the cursor moves to the next transaction instead of losing focus.

QA36346/9488 - New mechanism within PL sundry cheques to reset all documents in one go as well as being able to reset the currently selected document.

QA36401/9487 - Within Edit transaction details; new filter form, new filter and reset buttons (enables the user to filter the grid by one or more of the grid columns).

Sales Ledger

QA32222/689 - New facility to amend due date in display accounts, according to priority to amend date in batch input.

QA32241/698 - In the list of selected accounts, within the Credit Chase function, the account number, name, overdue amount is shown. A column has now been added to display the number of items.

QA33279/776 - The system parameter for priority to Document transfer has been moved to the General tab. Note: the parameter for the format stationery remains on the Format tab.

QA34001/644 - Take Deposits enhancement allows the transfer from one MK record to another for non-VAT chargeable deposits (provided no vehicles have been attached to it). Also provides the facility to attach a deposit directly to a vehicle linked to the MK target selected. The form has been modernised.

QA36066/888 - New e-mail address to SL and PL.accts to facilitate the e-mailing of statements, credit chase letters, purchase orders etc. via a k-print/mail server. SL and PL accounts created with links to marketing records and brings through the e-mail address from the linked target where appropriate.

QA36182/926 - Within Cash posting: Accelerators have improved, new single character accelerators to allocations grid, cursor moves down automatically after any actions, spurious accelerators have been removed and read only fields have been removed from tab sequence.

QA36255/9484 - SL display account details, transaction tabdetail shows the goods total and outstanding total on the form.

QA36401/9487 - Within Edit transaction details; new filter form, new filter and reset buttons (enables the user to filter the grid by one or more of the grid columns).

Aftersales

Purchase Control

QA31375/407 - In the parts verification program, when scrolling through list and selecting line to be rejected, the cursor pointer now returns to the row next to the line rejected.

QA31548/6823 - A new purchase control parameter has been added to PC system parameters called **Allow franchise mask**. With this tick box checked, a Franchise mask field is displayed, allowing the user to enter/select the franchise codes of parts to be listed under the Selection menu. There is also an additional parameter in the POS Operator file/PC Controls TAB called Franchise mask, which allows an operator to set up the franchise codes, to be defaulted into the Franchise mask when entering the purchase control main grid screen.

QA31711/503 - Functionality has been added to allow the user to left click in the header of the Supplier column within the main purchase control grid. The heading will change to read Account, and will display the Sales ledger account number for all purchase lines displayed that were backordered from a WIP in point of sale.

QA31737/513 - A new Purchase Control system parameter called Invoice Posting Option has been added. This will drive the posting date of Verified invoices. The values allowed are T for today's date, I, for Invoice Date, P the last day of the purchase ledger current period.

QA33445/496 - A new Check Box has been added to the User Details System TAB, called Mandatory Cost Centre. This is designed for a user who verifies invoices from different After Sales companies where the cost centre is different in each company. If the new check box is ticked, then the field the field NL cost centre is disabled and not used. When the user selects the verification screen, the Nominal cost centre field will default to a ? mark. This will force the user to enter/select a valid cost centre before exiting the screen/posting & complete.

QA36763/641 - Within purchase verification, a new button has been added on the Delivery notes TAB called "Select GRN's". This will display a new form displaying all the GRN lines at R status for the selected Supplier on the Invoice header. GRN's can be selected by clicking the first column. A running total will be shown for the selected GRN's. If you have selected several lines, and wish to start again with a zero value, click on the Select All radio button twice and the value will return to zero. The lines displayed are in the same order as entered into the ptran file. There is no GRN key path.

Stock Checking

QA32112/640 - When a check file is Active and the Generate stock check file is selected, the button which used to overwrite it now reads *Append to existing file*. (QA 32269 carries out out this new functionality). Most screens in the Stock Checking module will now display the Location number and name. This is displayed in red in the top left hand corner. The name is picked up from the stock management system parameters Locations TAB. So it is a good idea to have these descriptions completed.

QA32269/639 - The stock checking module has been enhanced to allow a partial stock check list to be generated, and before it is completed, additional check lists can be added (generated) to the current stock check file. You should note that if an attempt to run *Generate check list* whilst a check file is on file, the on-screen button no longer reads *Overwrite* but now reads *Append to existing file*. If the append routine is not required and the current Check file is no longer required, then the option Free check file must be used before generating a new Check File. The user will no longer be able to add a part number to a Rough Sheet, if it does not appear in the stock check file. However, the user will be able to stock check count a part a second time even though the first count has been used to update the dealers stock file.

Stock Management

QA32152/927 - The field *Weight* held on the parts stock record *Other* TAB, has been increased from 3.3 to 5.3.

QA32436/665 - A stock management system parameter called Make/Break Assembly Priority has been added to the main details TAB. With this parameter set to a value greater than 0, the user will need a priority equal or greater than this parameter setting in order to Make or Break assemblies in either Stock Management or Point of Sale.

QA37211/633 - Changes made to add new functionality to manage seasonal equipment (winter stock) in Autoline.

QA42157- The PARTDISC parameter will be compared with the users priority and will control whether the discount code and discount percentage is editable in the Parts Details form. Assuming there are editable lines on the WIP, the Discount Manager form can be envoked, but the "Edit part discount priority" (PARTDISC) parameter on the Parts 1 Tab within POS parameters will determine if Parts lines are editable, and the "labour price edit" (LABPRPR) parameter on the Labour Tab within Pos parameters will determine if the labour lines are editable. You must be aware of how the Fastrack flags are switched within Terminal details. The "Labour price edit" parameter controls both the labour price and the labour Discount fields.

Note: The selling price of a part is subject to the priority defined by "Price edit" (PRICEPR) on the Parts 1 Tab within POS parameters in the first instance, and overriden by the priority defined by the "Override priority" (ORPRIORY) field on the part record if it is non-blank ie a value between 0 to 9.

Point of Sale

QA31177/650 - New chassis number and magic number have been added to the Other Jobs Exist form. The format in the header now reads RegNo (Magic No) Chassis No.

QA31190/588 - VSB or MK lines are now pushed to the WIP in POS at H status (HELD) to hold the lines. This now stops VSB and MK lines from being deleted, it prompts the user to change the status of the lines when they are ready to print a jobcard.

QA31224/425 - Any NL, BS errors will be displayed in a grid prior to printing an invoice.

QA31250/397 - A system parameter has been added called *Allow labour rate change*. When checked, the Labour rate will change if an account code in Point of Sale is changed. If left blank when you change the account code, the labour rate won't change.

QA31362/405 - Two new fields in COMMAGIC and TARMAGIC to logla and larch and additional Keypaths to all files logpa, logla, parch, larch comprising COMMAGIC + MAGIC number and TARM.

QA31406/511 - On a supersession, the User ID is recorded in the log files even when the Qty is equal to zero.

QA31440/426 - New parameter called *Labour credit priority* . This parameter is priority driven to decide whether a user can enter a negative value labour line for the time allowed.

QA31442/444 - Non stock lines are now treated in the same way as Stock lines when editing the Selling price. We take the MAXIMUM of the "Override priority" (ORPRI) on the stock record and "Price Edit" (PRICEPR) on the POS parameters, and compare it with the users Login/POS operator priority to determine if editing should be allowed. A further patch will be written to have a similar priority for editing discounts.

QA31485/929 - PC.ptran.state is displayed instead of PC.ptran.status if so_warehouse = TRUE.

QA31764/580 - The creation of new vehicles has been enhanced by prompting the user to search and if necessary create the target details associated with the newly created vehicle.

QA31804/659 - New search method, called CONTACT (the User/Receptionist), on the *Search For WIP Number* form to help with the selection of a particular WIP. Also colour codes have been added to help to find WIPS that are : Fully costed WIPS - RED, Partially invoiced WIPS - YELLOW and Not invoiced - GREEN.

QA31869/7018 - New SO param to subtotal advice notes when batch invoicing (depending on whether sort batch documents is 1.)

QA32080/919 - Code specific to France has become a requirement in other countries. The selection form GB nation of Fran has been removed.

QA32306/649 - In Point of Sale following the input of an account code, there is a new *Confirm Input* form reading *Do you want to view outstanding transactions for the account entered*. If Yes is accepted all outstanding transactions for the entered account will be displayed. This will only be available if the following two parameters have been set: POS Parameters, Flags and Priorities, Header Tab.*Prompt for Outstanding Transactions* must be checked. *Preferred A/c categories* edit box must be populated with the account categories to be included. These categories are as per the SL Accounts.

QA32374/664 - The Registration date of the vehicle has been added to the string of vehicle data displayed at the top of the WIP form - currently only visible in the *More details* section of the vehicle tab in Point of Sale.

QA32395/654 - Changes made to control the facility of creating a new WIP (so that mechanics can only open existing WIPs and not create new ones). This is achieved by a parameters.

QA33337/420 - The description of the payment terms is now added to the Accounts tab, under the Terms dropdown. The *Credit limit* field on the Accounts tab is now changed to read *Available credit* for valid Sales Ledger accounts and the value shown will be the current available credit. This will remain as *Credit limit* for the cash accounts. The values shown are "Available credit" and "Credit limit" respectively.

QA33377/42297/930 - Mileage validation has been added on printing job cards The mileage will be verified to ascertain if a confirmation of mileage form is displayed. Two new parameters in POS parameters have been created to control this. These may be found as follows:

Point of Sale / System Maintenance / POS parameters / Flags and Priorities /Printing Tab

1) Check Mileage on job card: Check box used to determine if the option is available, check to make available.

2) Check mileage factor: This should be populated with a numeric value to determine at what point the verification will pop up the confirmation message box asking you to confirm that the mileage is correct. For example if the value entered is 1 then any mileage entered that is greater than the previous value will invoke the confirmation form, a value of 2 will require that the mileage entered must be twice that of the previously entered value and so on. The mileage confirmed is printed on the job card.

Note: This option will only be available if switched on, as described above, and there is a previously recorded mileage for the vehicle /customer selection made.

QA35015/602 - A new field has been added to the part record on the quantities tab known as " RORDER" but described as "Quantity on wips not saved". This RORDER quantity is also shown on the Parts Details form within POS when the part is entered onto a WIP. The free stock calculation now includes the RORDER quantity. A positive RORDER quantity will reduce the free stock.

As each line is entered onto a WIP, if the status of that line is included in the POS parameter "Flag parts on status" (SO_WP_FLAGBO) the RORDER field is updated on the stock record and the quantity is only held until that WIP is saved. So if another terminal is attempting to add the same part onto a WIP the RORDER quantity displayed will represent the quantity for this part held on on other WIPs not yet saved, ie the B/Order has not yet been created.

Note: The RORDER quantity shown in the Parts Details form, is the total RORDER quantity for the location the operator is currently using, whereas the B/Order quantity shown on the same form, is the total B/Order quantity for all locations.

Tip: Thought should be given to the Statuses held in the FLAGBO parameter and the impact that will have within the parts department. (The recommendation for this POS parameter "Flag parts on status" is SVWCI1PR)

Once the WIP is saved, the RORDER quantity for the WIP is removed, and the B/ORDER field updated appropriately if an order code had been used. If a WIP crashes during the day with an RORDER quantity recorded, then, within the Rebuild purchase orders and backorders program, the RORDER quantity will be zeroed. This will only occur when the rebuild is run within Times Operations. If the Rebuild is run in EOP and if the field RORDER is not zero the said field will be zeroed.

QA35809/928 - The original part number ordered in the parts lines file and the Parts Log file in the PORDERED field is now recorded. When the part is Backordered or put straight on an Order via purchase control and then the part is subsequently superseded.

QA35921/806 - Users can manually sell from multiple locations. Enter qty into parts form and if that qty exceeds default location amount, then offer other available locations.

QA35994/908 - ISO enhancements. On importing dealer order lines to WIP, split lines according to stock in locations. Allow only carriage to be added to ISO WIPs.

QA36023/663 - The TAG valuation screen will now display the Labour/Parts and Consumable values separately on separate lines, and the consumables can be printed onto the invoice using a new derived field. Set the 'Sundries active' parameter as "ticked" in the Fastrack TAB of the POS parameters, and enter suitable part numbers within the Sundries grid. Depending whether the Number is a part number or RTS code, ensure the code is held in the stock file or RTS file. When a WIP is created load the Consumables via the Menu Bar option "Tools". The sundries code and value will be loaded onto the WIP and shown separately in the TAG valuation screen.

In order to print the Consuables/Sundries value onto the Invoice (bottom left hand corner), the following derived field must be entered into the Derived screen and format (Trailer record) screens

(SUNTOT) sundries_total*total_sign

QA36053/898 - A System parameter has been added called ' Record operators in WIP ' to record the identity of the four members of staff involved in the key stages of the WIP, we will add the POS operator codes for the four stages defined to both the WIP header form and the WIP header database (SO.headr). The new fields will be as follows:

- OPCREATE Operator who took the booking
- OPBOOKIN Operator who booked the vehicle in to the workshop on the day. (Checked in)
- OPINVOIC Operator who invoiced the job
- OPBOOKOU Operator who handed the invoice and the car back to the customer. (Checked out)

This will automatically default the operator codes into the fields when Workshop Loading is switched on, but will have to be manually selected from the drop down menus when Workshop Loading is switched off. We have also made the Creating and Invoicing operator fields non editable when populated.

QA36180/900 - A new option has been added to allow the dealership to enter and control the labour operations that will be required during the customer's next visit.

QA36466/896 - In fixed width mode,input of labour text has been restricted to the number of printable characters.

QA36814/9781 - The function of the Customer field in POS has changed, the user can type the customers name or registration number straight in and search exactly the same way as it is done from the Customer Word Search ellipsis button. You can also do the wild card search using the * before part of the reg number.

QA36820/9788 - In the WIP line summary grid on the Action page lines that are still at Memo are now highlighted, Held and Uncompleted status in Red to indicate to the user which lines need attention when invoicing a WIP.

QA36832/9786 - Short cut keys have been added in POS to switch between the POS TABS - Account Options ordeR coDes Notes Vehicle Service and Workshop. The hot key is ALT + the underlined character on the TAB.

QA36835/9784 - The vehicle account number has been added to the Extended vehicle details form when clicking the More button from the Vehicle tab. This is to update the vehicle account number with ease and speed in POS rather than going in to Vehicle marketing record.

QA36888/9787 - New button on the main POS form on the account tab. This button is enabled when a vehicle is loaded and the account held on the vehicle record is different to the account on the WIP. The button offers users the choice of copying the account to the vehicle record.

QA37092/9780 - New *Date due in* form that is offered to the user when the WIP is saved, this ensures the due in date gets set on the WIP when Workshop Loading is switched off.

QA37149/661 - Allows the user to set a wip up for credit by clicking the invoice number in the wip history option. This also allows you to click on the credit document numbers, which will then run through the routine of trying to load the WIP into Point of sale.

QA37167/653 - The user is able to drill down into labour on valuation form. Now labour and sundries split by franchise are displayed.

QA37230/657 - The discount percent manager can work by franchise of parts and ms company of labour.

QA38459/9946 - Nibbling Labour and Text Archive Files: A new program has been added to the Point of Sale, System Maintenance Menu - named "Nibble larch and tarch files". This enables the system to consolidate old entries in the Text Archive file (tarch) via their link to the Labour Archive file (larch) based on the magic number held in both files (MAGIC).The option would normally be run as a timed operation on a regular basis and replaces the existing functionality for removing Labour Archive records which was included within the "Nibble files to size" timed operation. The values held within the System Utilities, ADP Menu, Application Files, Add/Modify module files entry for the Labour archive File (larch) are used to firstly decide whether the file needs to be consolidated (Nibble At percentage). Note that after the option has run the Labour archive file will contain at least the "Minimum Days Data" amount of records based on the "Date Edited" field (DATEEDIT). This may mean that the LabouArchiveve file contains more than the "Nibble to" percentage of records after the option has been run. Also, once the Labour Archive File has reached the position where it's percentage usage is at the "Nbble To" value no further records will be deleted so the file could contain more than the "Minimum Days Data" amount of records after the option has run.

Workshop Loading

Note: The following list contains the many enhancements made to workshop loading.

1. The View WIP function is able to display the WIP whilst it is in use by the user.

2. All the Workshop loading forms now offer Maximise capabilities.

3. A new flag has been added to the idle code form. It is a Y / N field to say whether an idle code is productive or non - productive. Also a 3 character field has been added for analysis, purely for RepGen.

4. The clocking file now warns the user in POS that it is getting full from 80% upwards.

5. A new field has been added to the Resource record to say what idle time codes are available for individual technicians, i.e. if +ABC is entered then only idle codes ABC will be seen by this technician and if -ABC is entered then all idle codes are available except ABC. Also a 3 character field has been added for analysis, purely for RepGen.

6. A new field has been added to the Resource record that represents the percentage of shift time that is on offer to the workshop. ie. if your are a workshop foreman and he gives 30% of his time training others, then set his figure to 70% the figure will adjust the technicians ability and adjust the hours in the workshop.

7. The skill codes have now been sequenced so that when loading tasks in to the workshop they will be loaded in skill sequence order rather than in the current line number order.

8. A new system parameter has been added called Load mode 3. If the technician has been assigned the first task, is then assigned all the further tasks on the WIP if he is skilled .

9. A new clocking function has been added to the technicians form, this will allow you to clock everybody in and out.It will also allow you to do this per technician and will resume the previous tasks if clocked onto or idle codes if clocked to.This is now two new forms called Bulk clocking.

10. The touch screen (CHUNKY) now shows the last clocking and WIP number and idle code against each technician.

11. The assist function in the technician activity form now shows an entry of every technician clocked on to the task and the system will automatically select the same lines that are currently active.

12. New fields have been added to the Resource record regarding the touch screen. SCREENS TO USE: a technician can be restricted to allow clocking only on particular touch screens in the workshop, up to two screens can be specified.i.e.. enter 5,0 to allow clocking only at screen 5, or enter 5,9 to allow clocking at either 5 or 9. Leave blank for access to all screens.

- ANALYSIS CODE: This a three character field it will be used for RepGen filtering on analytical reports.
- ASSIGNED TASKS MODE: This feature will determine the lists of tasks to offer technicians in the touch screen. 1.Show and offer first task. 2.Show all tasks but only offer the first task. 3.Show and offer all tasks.
- OFFER UNASSIGNED TASKS: Offer the technician unassigned tasks that he has the ability to do.
- ALLOW TECHNICIAN TO ASSIST: Allow the technician to assist others.
- OFFER ALL JOBS: This allows the technician to view all other tasks which he then if skilled is able to clock onto.

13. The Jobs form has a few new features.

- 1. A check box has been added to allow invoiced WIPs to be suppressed from the list.
- 2. A check box has been added to allow the list of tasks to be filtered to only show your WIPs the oneswith your ID.
- 3. Added to new columns - the advisor and the registration number.
- 4. You can sort and on columns 1,2,3,4,6,7 and 9 and sort in ascending and descending order.
- 5. The wording "outside scope" has been reinstated in the start and finish colums I.E jobs that have been booked in but not started. The department letter has been added to the WIP numbers to identify which department created them.

14. A new check box has been added called OTHER to the technician activity form. It will when checked show all tasks that are assigned to all technicians and that the technician has the skill to do these tasks.

15. The Left and Right clicks are now consistent in the Day form and Activity form grids that prompt pop up

menus.

16. Pinned jobs will now show the letter X in the first segment for that job.

17. When a task is scheduled for a time a technician is unavailable, the task will appear in RED and should be dealt with urgently.

18. On the Activity grid a new column titled *WITH* has been added to show who is assisting who.

19. The Activity form now has four tabs the ACTUALTAB the PLANNED TAB which is the original Assigned tab and the remaining Unassigned and Finished tabs, which are unchanged. The Planned tabs is the graphical representation of WL dplan showing the progress of each task using the conventional colour codes exactly as 8090. The new Actual tab is a graphical representation of the WL clock records fro today, so is 100% true reflection of workshop activity. When a task is clocked onto a Blue segment will appear and will extend and keep extending until the task is clocked off. The system will calculate if a task has been worked on for to long based on the time allowed and the skill efficiency and the Blue segments will turn into Red segments which will warn the user there is a problem with this task and possibly the next task. If jobs overlap each other the segments will turn Red and will show a character in the cell depending on the system parameter OVERLAP. There is no left click function on a task in this tab but left clicking on a technician will show all clocking activity for that technician for that day. Right clicking on a technician will take you to the clocking in/out form.Right clicking on a task will offer a popup menu to View the WIP, Go to WIP and Clockings - you will see all clocked activity on a WIP so far.

20. Two new system parameters have been added to be able to book the time so the customer can see the service advisor before the job is started. Meet and Greet RTS code and Load status on the Meet and Greet keys.

21. The Clocking adjustment program completely re-written. At no time will the user be able to corrupt or de-synchronise the clocking entries. Records can be Inserted, Created, Amended or Deleted.

22. The clock history form now summarises each clocking entry per line and the details in line or technician order.

23. In SO.OPERS a field called TEAMS, each operator can denote which teams of technicians he has at his disposal. i.e. enter the letters AC in the field to include all technicians in teams A and C and exclude all others. Leave blank for no filtering.

24. A new parameter called Last - resort Idle code has been added. A new button will appeTechnician Technician activity form which allows the operator to clock the technician onto that idle code.This will be used when waiting for further work when clocked onto this idle code the time clocked on will be the same as the time clocked out of the last job, thus leaving no gaps. Similary the time out function on the touch screen will automatically clock onto the special Idle code where appropriate.

25. A new tab has been created in POS called WORKSHOP. This new tab holds all the dates and times associated with Workshop loading, and the Customer waiting check box.

26. A new function called Play back has been added to the clock history form. This button when clicked will update the labour lines and bring them back into line with the clockings. This will be needed when a WIP is in use and a clock entry has been made, either the IN event, the OUT event, or both events failed to process over the labour lines, so that Play back when clicked will update them.

27. The Workshop numbers form has been revised. This now shows Your Work in Progress for all the days and for all resources or selected resources, they can also be filtered by Skill or by Team.

28. The Technician Ability form has been rewritten. You now flip between the two sets of figures using a simple radio button, and using the guidance system you can select the actual figures you want to be come operational. The Actual figures come from a statistical analysis of all invoiced lines over the last 90 days.

29. The multi-mechs button is now called Clockings and is enabled at all times, as it shows all clockings over all lines on a WIP.

30. A new icon has been added to the touch screen with Multiple Ticks this allows you to select all the available lines of a WIP rather than selecting each of them one at a time.

31. ORIGLINE has been added to POS labour files to record the line number that was used to perform the clockings up to the completion of the line. That line may then have been split or converted to other labour lines. The line column in the clock history form on the Detail tab will show the ORIGLINE value if it is not equal to the line value. i.e. if it shows 7/3 it means that line 3 was used to perform all the clockings and then line 3 was subsequently split into lines 3 and 7 (a percentage split).

32. Batch input of time sheets has been added back. This has been split into two areas, Input for your required data and Progress which calculates your entries per resource and per session. We can also review each entry we have made and amend if necessary using the parameter called 'Priority to Adjust'.

33. A new system parameter has been added called Priority to Adjust. This is used for Batch input of time sheets giving the user priority to amend them.

34. We have enhanced the technician clock out function by adding the 'No work' option. This allows the technician when clocking off to be able to select any other labour lines that are available. A legend has been added to aid with mutiple technicians working on the same WIP.

CRM

Customer Relationship Management

QA16353/904 - Marketing vehicle stocking systems only: The operator can now edit a vehicle specification line, attach it to a purchase order and link it to a supplier account. The estimated cost will be entered and the order can be printed. When the invoice is received from the supplier, it will be posted to the supplier's account and back to the vehicle specification line to update the actual cost.

QA31369/652 - A column has been added to the contact history form to show the registration number of any vehicles that are associated with the contact.

QA31412/QA32463/498 - The user can now drill into the diary entry for contact-type entries, into the contact creation form so that follow-ups can be done from there rather than having to go into Marketing.

QA31842/677 - New tools added to allow users to FTP files to a site. This has been provided to reduce the amount of manual work by the user. This means once the project is completed ftp'd and copied to live all the user has to do is switch the screen on the User access control.

QA32483/702 - New option to create a new data file automatically rather than having to do this manually in the user defined forms editor. Also the ability to update the existing data files when amending existing forms and dictionaries has been added.

QA32783/707 - New sales executives email and mobile number to the derived fields in Target letter templates.

QA33399/941 - When doing ad hoc enquiries within Campaigns enable Target, Vehicle and Company user defined details to be linked and reported on.

QA34145/508 - New options have been added to allow a user to output customer correspondence as E-mail or SMS text message to a mobile phone. This includes new letters types in marketing record maintenance to define between the preferred contact types when running campaigns and report generators that create contacts. There has also been changes to the campaigns form so that when the different output types of SMS and E-mail are selected the letters tab will change from RTF format to a text editor for the SMS or E-mail message.

QA34506/34574/9071 - For systems where Call centre is included a record of any outstanding callcentre calls has been added to the target casefile. Also if there are any out standing centre calls displayed you are now able to drill into the call details.

QA35484/795 - Follow-up hours has been added to follow-up due date and time.

QA36050/897 - A new field has been added to the Marketing target record (MK.targt) to determine whether the customer resides within the dealers defined market area (Australian terminology is PMA Prime Market Area) The new field name is CMA and described as *Core/Prime market customer?*.

QA36488/9642 - A new prompt has been added in marketing campaigns so that if a user creating a new campaign chooses to close it they are asked if they want to save it first.

QA36509/899 - Currently on the ADP system when you are creating a new Target record the system allows you to select the address using the postcode database. When you have entered the postcode and tabbed off the field the system would then offer you the properties in that postcode area to select from. Once the property had been selected you would then need to do a tab and then OK the address or cancel in to the default target template. This routine obviously included an unnecessary key stroke for the keyboard user. The changes made in this enhancement are designed to remove the unnecessary key strokes and therefore make the postcode search easier to use. Now when in the postcode search facility and having selected the property you require you can simply OK the postcode search box. You will no longer have to tab first.

QA36659/676 - A new global routine allowing creation of Sales Ledger account records with data taken from the default Sales Ledger accounts record and an existing Marketing Target/Company record from any module outside of Sales Ledger. The Creation routine forces users to search. If Sales Ledger/master debtors is used then the normal rules regarding Sales Ledger/master debtors should still apply, if a Sales Ledger/master debtors record doesn't exist then one should be created.

QA37159/10000 - The ADP standard reports behind the Duplicate target and company options from the database cleansing menu have been amended. The amendment made now allow you to see all of the duplicates of record information.

Customer Contact Management

QA31196/6689 - Support added for custom dropdowns / lookups and maintenance routines.

QA31641/938 - Option added to system parameters to show actual / predicted contacts chain on the Homepage at the beginning and end of a call.

QA31815/0 - Popup related calls list (inbound) now includes pending calls. Also add button to Use a related call this will launch the appropriate related call script .

QA31988/0 - The number of subroutine parameters increased from 10 to 20.

QA32029/939 - The CONTSensureshe call list added so that when a call is completed the previous contact is closed (This applies to call lists that are created from contact history).

QA33029/940 - A script can now execute without a primary script table (and dictionary). This allows a script to directly update MK targt, compy, vehic, extra, tarud, vehud and comud files and be executed from within marketing.

QA35207/794 - Courtesy calls and chase-up calls - If the call centre pass a contact to the dealership, they can generate a call back either when the follow-up is completed (to confirm the customer satisfaction etc.), or if the follow-up becomes overdue (to try and rectify the situation).

Environment

Advanced Analysis

QA36085/8618 - A new option has been added to allow you to print off an Advanced Analysis view. When a view is displayed, the option to print is found in the File menu.

Global Module

QA31412/498 - The user can drill into the diary entry for contact-type entries, into the contact creation form so that follow-ups can be done from there rather than having to go into Marketing.

QA32430/7356 - Agent event log reporting has been enhanced to now report non fatal errors as level 5 (Serious, but non fatal, errors). This has been acheived achieveding the event log level of calls to 'gb_eod_mesg with the terminate flag set to 'N' from 0 (Success) to 5. The Agent message routines have also been tidied up.

QA32463/31412/498 - The user can drill into the diary entry for contact-type entries, into the contact creation form so that follow-ups can be done from there rather than having to go into Marketing.

QA32705/0 - KCML 6 *Snoop* facility added for kcc and priority 8 users.

QA33150/909 - When selecting diary tab, the focus is instantly on the grid, so that you can use the page up/down buttons to go to previous and next week respectively. Any other key can be used to open up the diary page to enter an appointment.

QA33353/780 - Editing standard grids now displays the field name as well as the field description.

QA33589/787 - Facility added to sort mail by date *in*, *out* and *keep boxes*, by clicking on date column.

QA34389/910 - New functionality has been added so that when another user is added to the owners field of your diary, if it is suffixed with a * they will not get emailed when another user adds an entry to the diary. They can still see Private appointments, without being able to see Strictly private appointments, the same as on 8090. Also, there is new functionality on the date button in the diary, a QuickGoto date facility. This allows you to choose the month you want to go to directly rather than using arrow keys to take you there, as on 8090.

QA35109/901 - There are 3 new types of diary entry in the administrator function: 1.an appointment for the same date in every month for ## months,2. an appointment for the same date of every month for ## months, but the nearest working day (before if the date is on a weekend or holiday) 3. an appointment for the same number of working days in to the month for ## months, excluding weekends and public holidays.

QA35518/911 - Kcc users can break into desktop type programs (e.g. Workshop touch screen clockings).

QA36088/912 - New routine has been added to allow a local print or spooled print to be released to the printer without having to exit to the menu.

QA36096/360/782 - A new feature has been added to System Utilities/Management>menu/End of day file requests. This facility will now check disk space when you enter module, company and name of file to be extended. If the disk is over 95% full it will warn you and not allow you to put the file in for extension. You can now extend the same file from more than one company. A new table (GB.eodfr) must be created.

QA36509/899 - Currently on the ADP system when you are creating a new Target record the system allows you to select the address using the postcode database. When you have entered the postcode and tabbed off the field the system would then offer you the properties in that postcode area to select from. Once the property had been selected you would then need to do a tab and then OK the address or cancel in to the default target template. This routine obviously included an unnecessary key stroke for the keyboard user. The changes made in this enhancement are designed to remove the unnecessary key strokes and therefore make the postcode search easier to use. Now when in the postcode search facility and having selected the property you require you can simply OK the postcode search box. You will no longer have to tab first.

QA36612/819 - A new sub-routine has been written for format stationery that can be called within derived field form, and return the kprint version number. The version must first be set up in the grid in System Maintenance/Management Menu/Kprint Version Numbers, along with the criteria for checking. The criteria would normally be company number but could be any field, for example, branch number. A location can also be put into the grid as reference to reduce confusion.

QA36852/781 - Subject field extended when faxing copy documents to 80 characters.

QA37039/816 - Database Audit, based on a new audit control table (key of Module, Table,Column) and recorded to a new audit table (same key as control table with additional editing userid and timestamp) New Audit printing/viewing clearing programs will maintain these tables, the data will be filled from GB/GEDIT by calling a new global routine. This will allow any program to update the audit log allowing audit of GB/GEDIT forms, initial records and System Parameters records only.

Report Generator

QA33250/920 - In Report Generator, Define Report when opening a report you can add into file/properties/visibility tab a country code eg UK. For example, if environment variable "NATION" is set to UK this report would be accessible, whereas if the code was FR (France) it would not be. New functionality allows you to place a ! in front so that !UK would be accessible to anywhere except the UK, and also to add multiple country codes in a comma separated list.

QA34306/921 - Files can be joined together on a field by field basis rather than character by character. This is sometimes required where fields are different types within two different files (e.g. a stockbook number maybe a P3 in one file and a B3 in another). Note: RG_MATCHKEY must be set to TRUE at the time that the report is saved and the program is generated, i.e. not at run time.

QA34431/922 - ASP operation of report generator is allowed where programs/report definitions are shared in general but each member system also has its own reports.

QA34536/6149 - The amount of text that can be entered within the user instructions of a report has been increased. A scroll bar has been added for use at run time of the report.
QA34907/923 - A new standard derived field, !0_TOTAL$ has been added. This is instead of using carried forward totals and grand totals which cancelled each other out, resulting in no totals appearing, whereas this field enables both carried forward totals and a grand total to be put onto a report.
QA35653/9143 - Restriction of filename to 8 characters on RG export to PC removed.
QA35919/925 - A new environment variable has been set up to enable you to block rep gen access to any table. To do this you must set up the variable BLOCKTABLE in UserEnv.txt, to contain a comma separated list of tables. At run-time, rep gen will not allow anyone to run any report which contains these tables, giving a 'permission denied' message. You can also set up an environment variable, BLOCKLOG, to point to a file on a server, and any attempts to access rep gens containing blocked files will be logged here.
QA36376/889 - KPrint can specify a template in merged RTF letters.

System Utilities

QA31205/6726 - Sort and filter of columns enabled by right clicking, in retrieve archive.
QA31371/0 - Multi streamed chains added. Following QA 30002, full implementation of multi streamed Agent Chains.
QA33009/0 - Agent output log file improvements. 1) Show seconds in the log line time. 2)Log entry added to report failure to launch an option, this was always reporting success before. 3) always log immediately before launch, even if there is no wait due to running processes. 4) Use PRINTF statements for all logging 5) Do not log 'Waiting for time ...' for chained options. 6) Log all chained options, including those for the main chain, to the chains log file.
QA43363 - A new option has been added to the Utilities menu to access these Release Notes. All users with priority 8 access to the System utilities module will be able to view the relevant Release Notes to the system they are running.

Vehicle Sales

Franchise Data

QA35027/893 - A parameter has been added to Technical Data, this will stop the routine showing an error when unable to find CAP technical data for a CAP code.

QA35566/0 - Importer Systems only. Supplier prices displayed in the main form in supplier's currency, also shows the currency code in the grid.

Showroom

QA31358/610 - A new parameter has been added in User Details within System Utilities (GB.user) this will define the lowest progress code that a user can select from stock to stop some users from ordering from the pipeline (for example). This is for Marketing vehicle stocking only.

QA31419/435 - Provisional pricing process.

QA32764/671 - Updated the Used vehicle search additional search options now been added - 1) Location search, 2) Number of previous owners,e.g. up to 3 added - 3) Between first reg dates (from - to) aged calculated from regdate e.g.new - 1 year, 2 - 3years etc added.

QA34884/892 - New functionality to obtain finance information from an external source e.g. FNF if required when calculating a quote.

QA36360/891 - Speed up change for the Showroom stock lists.

QA38050/10305 - New facility has been added to suspend the use of the valuation data as an integral part of the trade in valuation routine, in the event that the data is not renewed on time. In order to achieve this functionality the system parameters have been extended in SR. The new parameter stops any valuation figure being shown or used - it's intended for when the valuation data is *late* or hasn't been loaded on to avoid giving bad valuations (Note: also available in 8090-13+).

Vehicle Stock Books

QA22399/0 - Priority updated from 1 to 5 for Stock reports menu, as when getting to this option, there were no reports behind the menu due to the priority level .

QA34662/0 - The Commission number field (COMM) has been added to the available suffices in the master posting table, therefore the suffix for any vehicle postings can be the vehicle's Commission number.