Autoline Release Notes

Revision 8.35.9090

Contents

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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 release notes are incremental and therefore only cover the changes and enhancements that have been programmed since the 8.30.8273 release.

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

Note: With the introduction of 9090, and in particular due to the functionality newly introduced in CRM, we suggest that for new installations available memory should be 8 - 10 Mb per user.

- **KClient version used for KCC testing** - version 06.00.54.9178 - or newer
- **KCML upgrade used for KCC testing** - version 06.00.54.9178 - 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/Rev8-30-9090/**

> **Note**: For systems using a non-standard back-up method that creates a token file in /tmp on completion of the back-up, administrators 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.

Windows 95 is no longer endorsed as a platform for the client PC operating system. Autoline is functional when running Microsoft Windows 98, however, there are known issues involving memory usage that lead to an increased risk of General Protection Faults (GPFs). GPFs are rare when using either Windows 2000 or Windows XP as the client PC operating system and therefore are the recommended platforms for KClient.

New Menu Items

Below is an overview of many of the new menu items added to the 9090 software. Click the hyperlinks for further enhancements in that particular module.

Nominal Ledger

- (QA41879) New "Cash Book" menu option.

Workshop Loading

- (QA43548) New 'Reload all jobs' menu option
- (QA42196) New 'Lock touchscreens' menu option

System Utilities

- (QA40313) Two new options on the SU/Management menu: Edit set-up (BuildInfo) and View set-up (BuildInfo)
- (Q46806) New 'KCBT' menu option.

Franchise Data

- (QA38135) A new utility has been added to the Data import menu

Main Functional Changes

The most fundamental change to the 8.35.9090 build is the enhancement of the Marketing module, now known as the Customer Relationship Management module (CRM). Significant changes have also been made to Showroom within CRM

Customer Relationship Management

CRM offers facilities for the Aftersales department as well as the Sales department and therefore is a good starting point for most users within a dealership.

The CRM module now allows you to hold more information about your customer base, gives the user a more informative view of each of their customers and allows the user to plan with a full view of their activities for the day. The manager has a full view of the sales executives' performance and outstanding follow-ups.

"My Desktop" will be the most used option for both the sales executive and the manager. New parameters and User Access Control settings have been enhanced to provide the new functionality within "My Desktop".

My Desktop

Menu option	Form/Tab	Description
My CRM	My Tasks	▪ Displays the sales executive's diary. ▪ The diary is displayed either as a day-to-view or a week-to-view. ▪ The default view can be set in User Access Control, and can be amended by the user. ▪ The sales executive's follow-ups for the day and overdue follow-ups are displayed against the appropriate time. ▪ The user can drill into either the contact or the customer from the diary entry. ▪ The user can navigate between days and weeks and can drill into each follow-up to action the follow-up or access the customer record. ▪ Access to the sales executive's Inbox, Outbox and Keep box, and allows the user to send e-mails.

"	My Customers	▪ Displays the sales executive's customers alphabetically by Surname. ▪ Option to sort by First name, Postcode and Short name. ▪ Option to display the customers as a business card instead of the a list. ▪ To find a customer or range of customers it is possible to apply reports from report generator. ▪ Option to "quick-find" by using up to 27 user-definable buttons, e.g. the S button can take you directly to all your customers whose Surname begins with an S. ▪ The customers are listed with their name, address, home, work and mobile telephone numbers, e-mail address and position. ▪ The customer's preferred telephone number is highlighted in blue. ▪ The user can drill into the customer record for further information.
"	My Enquiries	▪ Displays a list of all Showroom activity (e.g. Quotes and Orders). ▪ All columns of the list can be sorted. ▪ The list displays the enquiry, quote or order number, the customer name, new/used, the vehicle details (including the stock number), quantity, finance option, date and enquiry status. ▪ A number of standard selection criteria options (e.g. today's enquiries). ▪ The user can drill into each enquiry, either into the customer record or the Showroom enquiry.
"	My WIPs	▪ Displays all WIPs with a Due in date of today for the user's branch (based on user's access to POS companies). ▪ Filter options for Due in date by WIP status and Registration number. ▪ Advanced filter option for Company, Department and Operator. ▪ All columns of the list can be sorted. ▪ The user can drill into either the customer record or the WIP. ▪ Option to display more information from the WIP without accessing POS.
"	Today's Performance	▪ Displays the follow-ups due today, and overdue follow-ups. ▪ Displays the Showroom enquiry events for today. ▪ Displays the contacts actioned today. ▪ Option to view follow-ups, events and contacts actioned for any sales executive within a team (access permitting). ▪ Today's date can be changed to view another day's activity. ▪ Maximise facility to view more information from one of the sections of the form. ▪ Checkbox to include only the current Showroom enquiry events (i.e. what the sales executive is doing now).

"	Statistics	■ A Grid and graphical view of Showroom activity. ■ Includes follow-ups, enquiries, quotes, test drives, orders, confirmed orders, invoiced deals and lost sales. ■ Option to display statistics per sales executive or team of executives. ■ Option to display statistics for new vehicles, used vehicles or both vehicle types. ■ Option to change statistics to display the number of units, the value or the profit. ■ Option to change the period for the statistics (e.g. Today, week to date, month to date). ■ The user can drill into either the contact (for follow-ups), the showroom enquiry of the VSB record. ■ Checkbox to include the values on the graph. ■ Facilities to Maximise the grid to view more information and to maximise the graph for a larger graphical view . ■ Back option to view the previous view. ■ Reset option to reset all filters to the default setting.
"	Impersonate	■ The Impersonate option allows a user to switch to view My Tasks, My Customers, My Enquiries, My WIPs, Today's Performance and Statistics for another user.
CRM Shortcuts	Company	■ Redesign of the Company form. ■ New fields to record the country code and the company's web-site address (with option to link to the web-site). ■ Fax facility. ■ Sales ledger account code creation.
"	Customer	■ Redesign of the Customer form to display the following for each customer on one form: ○ Contact summary with option to drill into the contact record, and filter options to show contacts for a group code, location code, department and sales executive. ○ Vehicle summary with option to drill into the vehicle record. ○ Customer activity with option to drill into the Showroom enquiry record. ○ Casefile. ■ Preferred telephone number field. ■ Best time to call options. ■ Sensitive customer field. ■ Transport type field. ■ Fax facility. ■ E-mail facility. ■ SMS facility. ■ Sales ledger account code creation. ■ Loyalty card options. ■ Introduction of multiple location ownership of records.

"	Vehicles	■ Redesign of the Vehicle form. ■ Update mileage option (parameter controlled). ■ Immobiliser code field. ■ Service history options: ○ Filter for service code. ○ Filter for sales ledger account. ○ Filter for branch. ○ Filter to display service lines only. ○ Consolidate option to ignore matching invoices and credit notes. ○ Sort order option (ascending/descending by date).
My Shortcuts	Blank Enquiry	■ Access to Showroom to create a vehicle enquiry (no customer loaded).
"	Customer Enquiry	■ Access to Showroom to create a vehicle enquiry (with the current customer loaded).
"	Quick Start	■ Access to Showroom to create a vehicle enquiry (with an alternative start point focuses on the trade-in vehicle).
"	Blank WIP	■ Access to Point of Sale to create a new WIP (no customer loaded).
"	Customer WIP	■ Access to Point of Sale to create a new WIP (with the current customer loaded).
"	WIP Wizard	■ Access to Point of Sale using the new Up-sell facility.
"	WIP Search	■ Access to the search option within Point of Sale.
"	Workshop	■ Access to Workshop Loading within Point of Sale.
"	Blank Enquiry	■ .
Casefile	-	■ Redesign of Casefile form to give a clearer view. ■ Tree control and section headings. ■ More User Access Control settings.

Extra Details	-	▪ Search facility for generic colour and trim for vehicle required. ▪ Multiple radio stations and newspapers can now be selected per customer. ▪ Marital status has now been added to the look-up table for extra details to allow for user defined codes and descriptions.
Contacts	-	▪ New five-step easy to use contact creation process (Wizard mode). ▪ More User Access Control settings. ▪ Wizard mode on/off option. ▪ Redesign of standard contact creation form. ▪ Priority controlled options to delay and transfer contacts (original date and time is stored). ▪ Quick e-mail, SMS and fax facilities. ▪ Preferred contact number and best time to call displayed. ▪ Access to Extra Details. ▪ Contacts can be defined as a letter, SMS, fax, e-mail or load Showroom enquiry to automate next action. ▪ The input of contact notes now features wrap round.

Demonstrator Bookings	-	▪ New table to hold demonstrator vehicles.
		▪ Demonstrator vehicles are created automatically from VSB.
		▪ Option to manually create demonstrator vehicles.
		▪ Options to book vehicles to customers and to sales executives.
		▪ Bookings are represented on a daily grid.
		▪ Bookings are colour coded to show future bookings, approved bookings, current demonstrations and overlaps.
		▪ System parameter priorities to control who can create, start and approve bookings.
		▪ Filter options for:
		  ○ Registration number.
		  ○ Vehicle type.
		  ○ Location.
		  ○ Franchise.
		  ○ Model.
		  ○ Transmission.
		  ○ Fuel type.
		▪ Driver details to hold information about driver’s driving licence.
		▪ Parameter driven contact codes for creation of contact history for demonstrations that have started, finished and for CSI.

Other CRM options

Menu option	Form/Tab	Description

Customer Satisfaction	-	■ E-mail and SMS facilities. ■ Update mileage option.
Contact Type Codes	-	■ Additional tab (Detail 2) includes: ❍ Force follow-up code ❍ Contact method
Loyalty Cards	-	■ New table to hold Loyalty card codes that are used within the Company, Customer or Vehicle record. ■ Each record has a three character code and a description.
Loan Car Options	-	■ New table to hold options required for the Up-sell process in Point of Sale.
User Access Control	-	■ Auto refresh interval in minutes (refreshes all tabs within My CRM). ■ Default wizard mode for contact creation. ■ Default CRM diary view by day or by week. ■ Diary start date. ■ Maximum recommended daily follow-ups allows will highlight when the sales executive has overloaded the diary. ■ Can delay follow-ups setting. ■ Can reallocate follow-ups setting. ■ Auto-lock CRM in number of minutes. Once locked, a password is required to unlock. ■ Export definition for use with the option to export My Customers. ■ Available buttons for My Shortcuts. ■ Casefile Access: ❍ Can see company notes. ❍ Can see company information. ❍ Can see customer notes. ❍ Can see open contacts. ❍ Can see customer information. ❍ Can see CCM calls (only for systems with CCM module). ❍ Can see vehicle notes. ❍ Can see vehicle information. ❍ Can see vehicle dates. ❍ Can see truck dates. ❍ Can see backorder parts. ❍ Can see account notes. ❍ Can see account information.

System Parameters

Description

- Detail 1:
    - Quick SMS contact – contact code used for SMS contact record creation.
    - Quick E-mail contact – contact code used for E-mail contact record creation.
    - Key fields edit priority – priority required to edit fields that are defined as system key-paths.
- Other:
    - Loyalty card level – determines if the loyalty card information is held on the company, customer or vehicle record.
    - CRM statistic decimal places –number of decimal places are displayed in the CRM statistics grid.
    - Maximum word search results returns – maximum number of records that will be displayed after a word search is performed.
    - Enable account number buttons – switch on to allow users to create sales ledger accounts within CRM.
    - Odometer check – control to prevent a user changing the mileage beyond this number of miles, kilometres or hours.
    - Default export definition - for use with the option to export My Customers (overridden by User Access Control setting if there is one).
- Demo bookings parameters:
    - Priority to create demo vehicle.
    - Priority to amend demo vehicle.
    - Priority to immediately start a demo.
    - Priority to authorise a demo.
    - Priority to delete a demo.
    - Priority to start a demo without a licence.
    - Default length of a demo.
    - Demo retention days.
    - Format stationery for demo agreement.
    - Questions for quick bookings (up to five allowed).
    - Contact codes for confirming a demo, completing a demo and CSI.
- My Customers
    - Letter short cuts for quick-find facility.

Showroom - CRM

One of changes to the 8.35.9090 build is the enhancement of the Showroom module, now known as Showroom CRM (Customer Relationship Management).

The Showroom still offers the existing functionality but we have added a number of options that work in conjunction with the CRM module.

New Functionality

Description

- Lock workstation.
- Reboot VSB when first entering SR.
- Showroom vehicle search gauge.
- Previous enquiries.
- Event log.
- Trade-in valuations.
- Acceptance of SR orders into VSB.
- Pictures in Showroom.
- Multiple pictures.

Quotation Screens

Description

- Custom entry.
- Previous usage.
- Matching stock.
- Redefine search.
- Enquiry builder.
- Include a trade-in.
- Option wizard.
- Specification summary.
- Qualification.
- Value and return.
- Show presentation.
- Show discount on printout.

Sales Person Settings

Menu option	Form/Tab	Description
-	General Tab	▪ Open or wizard process. ▪ Showroom presentation URL. ▪ Use Qualification. ▪ Email notification.
-	Finance Tab	▪ Can offer finance. ▪ User for finance.

-	Vehicle Tab	- OTR price on variant search results. - Default VS company. - Other VS companies.
-	Trade-in Tab	- Can value trade-ins. - Set offer price on trade-ins. - Must use previous valuation. - User ID of trade-in valuer.

System Parameters

Menu option	Form/Tab	Description
-	General Tab	- Individual Sales person settings. - Change sales executive ownership.
-	Vehicle Tab	- Picture Alignment. - Day's valuation valid for. - Number day preparation for resale for PX.
-	Retention Tab	- Retention period for event log.
-	Contact Tab	- Look now contact code. - Stem contact codes.
-	Other Tab	- Default VS stock company. - Other VS stock companies.

Other 9090 Enhancements

Following are descriptions of enhancements and updates (listed by module) since the last release.

Accounts

Accounts

Management Accounts

Main Menu

Menu option	Form/Tab	Description
Copy NL Actuals to MA	-	**QA41165/622 - E8 -** This enhancement now assigns the correct accounting periods to all future postings in the Nominal Ledger and writes them into the correct future periods in the Management Accounts records, whereas previously all the future postings in the Nominal were assigned the first future period in the Management Accounts. It will only do this for any transaction record in the Nominal that has a posting date that falls within the 2 year range of the dates file. Any other future posting will be ignored when copying actuals to the Management Accounts.

Nominal Ledger

Main Menu

Menu option	Form/Tab	Description

-	-	**QA44784/12103 - R8 -** We have made an amendment to the Nominal Ledger postings when a part is requisitioned against a Wip that relates to a Vehicle Stockbook number. The suffix used for the posting will now be the Vehicle Stockbook number if the Point of Sale 'header' details contain a VSB reference. This is so that all postings to the Parts Work in Progress account can be reconciled according to the suffix used as the invoice and credit entries were already using the VSB reference. **Note**: If the user requisitions a part where the Wip contains a VSB number but then decides to invoice the item to a "non VSB account" the requisition postings to the Parts Work in Progress will contain the VSB reference as suffix but the invoice postings will use the Department letter and Wip number as previously.
Insert NL Journal Entries	-	**QA38542/10244 - R8 -** Insert NL Journals [new grid style of journal entry]- bring the Cost Centre Split functionality in line with the Line entry of journals. Functionality changes: cost centre splits are apportioned and re-calculated correctly if an amendment is made to the cost centre split. Also, the prevention of amendment or creation of cost centre splits that are attached to invalid account codes. Plus the prevention of deleting cost centre splits that still have balances on the accounts they are attached to.
Insert NL Journal Entries	-	**QA42594/1125 - R8 -** NL Journals: Introduce a new facility to force users to enter an Item Reference [in Customer Reference field], and to not allow the user to enter a new reference until the item balance nets to zero. Upon every change in item reference, a new daybook item is created, which will aid drilldown on one daybook item at a time. [reporting should be made easier]. This facility is optional, and is only activated by ticking a parameter in NL.systm to allow "Multi-Line journals"
Imported Journal Options or Insert NL Journals	-	**QA39358/742 - E8 -** Nominal Ledger : Imported Journal Options have now been included in the main Journal Entry options for new style Journal Entry only (NL/JPOST)
Add/Modify Expense Codes	-	**QA41228/759 - E8 -** Introduce a preview of NL account codes that are created with new expense codes displayed in the form of a grid with a 'Create accounts' button in place of the existing 'Create valid accounts' confirm message. Follow the same logic as used if the 'Create valid accounts' confirmation had been taken, but deferring the creation of the accounts until the preview form's 'Create accounts' button has been clicked.

Cash Book Menu	-	**QA41879/422/1132 - E8 -** New Cash Book Functionality introduced: Includes: New menu option "Cash Book" [driven by new System Parameter], as well as existing Quickcash [re-named "Process Bank Statement"]. Retains the selected account details (account number, name) until the operator chooses another account. Allows the change of the printer after selecting Finish. A cashier 'End of Shift/day' routine has been provided. A summary report, displayed on screen of all transactions processed by terminal or all users for the shift/day for a selected cashier's control account.

Cash Book Menu

Cash book/Process Bank Statement	-	**QA43677/13911 - R8 -** Further changes to Cashbook & Process Bank Statement now committed under same QA- VAT is recalculated on Discount and Write-Off as per SL/PL Cash. Also ensure correct cost centre is used when posting recalculated VAT, and ensure vat file handles are reset to zero once closed, so that they are re-opened before discounting or writing off amounts on different accounts.

Period End Options Menu

Close Period	-	**QA41110/691 - E8 -** At the moment the period number is only written against NL transactions when they are moved to ATRAN during EOP. We will enhance this to write the accounting period and year numbers to the 'current' transactions as the daybooks are printed, to facilitate a 'whole year open' style of period management.

VAT Options Menu

Verify VAT Totals	-	**QA42085/1118 - E8 -** Enhanced the Verify Vat Totals option to carry out automatic rebuild of control balances when running in timed ops and it senses an imbalance. **Note**: This option needs to be set in Timed Operations and have the parameter for that option set to 'TRUE' before this will carry out an automatic rebuild.

System Maintenance Menu

System Parameters	EOD/Period	**QA43460/1196 - E8 -** Add a new system parameter which allows control of whether you want Latin Sequences assigned to you atran files. When switched on this facility will assign a Latin Sequence to each Daybook for the Current account year transaction starting at 1 for the beginning of each financial year. This assignment of sequence is done in the Nominal Ledger period roll over program.

Report Generator Menu (NL only)

Define Report	-	**QA43490/1197 - E8 -** Add a facility to Report Generator and a Nominal Ledger overlay program that allows the user to write Rep Gens which will access multiple daily files for a range of daybook numbers. Both for printing and display purposes. Examples of how the reports should be written are attached to the issue as documentation.

Purchase Ledger

Main Menu

Menu option	Form/Tab	Description
Authorise Invoices	-	**QA41911/937 - E8 -** Add to the Purchase Ledger Authorise Invoice form the Currency Code and Currency Description when displaying invoice details to authorize. Only do this the the Purchase Ledger Account in question is not running in base currency.
Batch Input of Documents	-	**QA42169/1124 - E8 -** Enhance the Gross Input facility in Batch input of documents in Sales & Purchase Ledgers to allow the Gross Input to be decided at document level rather than Batch level. This facility to also allow the analysis of a document to be done gross as well as the document header.

Remittances and Cheques Menu

Edit Document Status	-	**QA41897/907 - E8 -** Add running total to PL edit document status for documents with payment status of 0-9. On entry of a valid account code the running total is updated according to documents already set for payment on the account. As the user changes document payment status codes so the running total is adjusted accordingly.

Invoice Register Menu

Enter Registered Documents	-	**QA41928/987 - E8 -** Change current batch imbalance message in Invoice registration to "Batch total is out of balance by ..." and "Document count is out of balance by ..." so that the difference is now displayed in the message.

Miscellaneous Options Menu

End Current Period	-	**QA41186/756 - E8 -** Lock Company whilst closing SL and PL accounting period, do not allow close if unable to lock company.This is to align with the NL End of Period routine.

Sales Ledger

Main Menu

Menu option	Form/Tab	Description
Display Accounts	Transactions Details 2	**QA42995/995 - E8 -** Increase PRSENTID to be 8 characters in length. Also add validation of Userid selected, by adding an ellipsis search facility. [e.g if the userid is not on file, validation will not allow it to be selected.]
Batch Input of Documents	-	**QA41177/753 - E8 -** Use the stop flag in SL Batch input to warn users the account is on stop, and in Generate and print invoices to prevent users from creating a document.
Batch Input of Documents	-	**QA42169/1124 - E8 -** Enhance the Gross Input facility in Batch input of documents in Sales & Purchase Ledgers to allow the Gross Input to be decided at document level rather than Batch level. This facility to also allow the analysis of a document to be done gross as well as the document header.
Cash Posting and Allocation	-	**QA43161/1098 - E8 -** Change analysis grid so that when using the recalculate VAT function the VAT column is checked by default, so that the user doesn't have to check the column every time.This is dependant on the VAT group field "SDBASIS" used for SL/PL account NOT being set to "G".

Miscellaneous Options Menu

End Current Period	-	**QA41186/756 - E8 -** Lock Company whilst closing SL and PL accounting period, do not allow close if unable to lock company.This is to align with the NL End of Period routine.

System Maintenance

System Parameters	Batch Input	**QA42047/1117 - E8 -** Add a new system parameter to Sales Ledger parameters on Batch Input tab to control whether document numbers are Manually entered or generated either using a Combined or Separate document number sequence.Make necessary changes to Batch Input of documents to allow for the setting on this new parameter. **Note**: Although this will work with out creating a new Journal Type and relevant records in the Document Nos control file. It is recommended that a new Journal Type is created and the relevant records placed into the Document Nos. control file.
System Parameters	Cash Posting	**QA42596/1172 - E8 -** Add a system parameter to Sales Ledger Cash Posting Tab to control the usage of Audit report in Till Reconciliation. Additionally add to the Bank & Currency menu the Prima style Bank Reconciliation.
-	-	**QA41163/573 - E8 -** To make use of technology [e.g e-mailing especially of late has become very popular and is widely used in everyday business] and to give our customers a greater choice of how they distribute their statements to their customers.and to potentially save paper by electronic distribution rather than sending everything in the post, a facility to fax and e-mail SL statements as well as printing them in the traditional manner has been devised.

Aftersales

Purchase Control

Main Menu

Menu option	Form/Tab	Description

Verify Received Invoice	-	**QA23534/371 - E8 -** Accelerator keys have been added to the Verification routine. The Post and Complete and Accept All buttons can now be executed by using the combination of ALT and "O" and ALT "A" keys respectively. These buttons can be found on the Header and Delivery Notes Tabs of the Verify & Post Received Invoices. The enhancement request mentioned the speed of entering data in the delivery Notes Tab, which necessitated the click of the mouse. Instead of using the mouse to click in the cell prior to entering data, the depression of the space bar will also allow data entry. If the Tab key is used immediately after entering the Delivery note numbers before leaving the grid, then if the grid is re-accessed at a later date, the operator only needs to press the space bar within the grid to enter data in the next available cell.
Transfer Receipted Order	-	**QA37904/1221 - E8 -** We have amended the operation of the Transfer receipted order option in Purchase Control so that the parts to be transferred will not go into a negative stock situation. Previously this would happen if POS users sold/transferred a part from the Transfer Source location before the option had been run.
Transfer Receipted Order	-	**QA42735/1169 - E8 -** We have added a new facility to the Transfer receipted order option within Purchase Control. When transferring receipts relating to an order or goods received note number with many parts involved it is now possible to enter an "Additional Filter" on the Part Number field recorded in the purchase transactions file. Note that it is possible to enter the partial stem of the part number(s) here as well.

Stock Checking

Menu option	Form/Tab	Description
		QA32269/44019/639 - E8 - The stock checking module has been enhanced to allow a partial stock check list to be generated when an existing check file already exists and may not be completed. Any number of partial check lists can be added, emulating the perpetual Inventory. You should therefore note that there are now two modes of stock checking in addition to the Perpetual Inventory. ▪ A Full stock check (defined by not applying any range crate when using the Generate option) is unchanged and the Status of the SC system Controls will be updated with "F" ▪ A Partial stock check (defined by using range criteria when using the Generate Check List option) will set the status of the SC System Controls with a lower case "f" As an example a user can now generate a check list for a bin range of 1A001 to 1C999 and immediately follow that up with a second check list of bin range 6D001 to 6F999. It does not matter if some of the parts in the first list have been counted/entered or some have updated the stock file. Remember that the individual check lists are held in one single check file.

-	-	If you generate a Partial "check list" whilst a Partial check list is in place, then an on-screen button described as "Append to existing file" is displayed. If the append option is not required and the current Check list/file is no longer required, then the option "Free check file" from the menu must be used before using the Generate option. If you generate a Partial "check list" whilst a Full check list is in place, then an on-screen button described as "Full check file already generated. Try adding parts in the rough sheets" is displayed. If you generate a Full "check list" whilst a Partial check list is in place, then an on-screen button described as "Overwrite existing file" is displayed. If you generate a Full "check list" whilst a Full check list is in place, then an on-screen button described as "Overwrite existing file" is displayed. In the Partial check mode, the user will no longer be able to add a part number to a Rough Sheet if the part number is in the stock file and does not appear in the current check file. The message "This Part is NOT in your Check File, move the part to its current bin location" will be displayed. A part number can only be added to the Rough Sheet, if the part does not appear in the Stock File and Stock Check File. In the Full check mode, all parts will be allowed on the rough sheets regardless of whether they are held in the Stock File or Check file. A feature of the Partial stock check process, will allow the user to be able to 'stock check' a part number a second time round, (within the same check file) if the first occurrence of the part number has been processed and updated the stock record in the stock file. Please note there cannot be duplicate part numbers (records) in the check file at any one time. A new report is printed automatically when the "Generate check list" is run under the following conditions: If any part numbers in the selection criteria of the latest Generate check list are already in previous check lists on file and input quantities have not yet updated the dealers stock file, will be printed on the the "SC Check List - Exception Log". The second half of this report will list part numbers that have been added to the check file via the generate option. These parts will have already been counted and updated the 'dealers' stock file since the last Free check file option was taken. Note, the date the part number was last stock checked is also printed on this report for reference purposes.

Stock Management

Main Menu

Menu option	Form/Tab	Description
Stock File Maintenance	Quantities	**QA37892/1220 - E8 -** The Stock File Maintenance option has been enhanced so that if the SM/binlo file exists and a bin location entry is amended via the Quantities Tab the bin location records for the previous and amended values will be updated appropriately i.e. previous record will have it's Part Number field set to blank and will become a "Free bin" displayed when searching at any Bin Location value via the ellipsis search facility. New record will be created with the amended Part number filled in.

Miscellaneous Options Menu

Populate Bin Location Records	Quantities	**QA37897/1219 - E8 -** We have enhanced this option so that the Part Number field will now be filled from the Stock Record details. The option can now be run as a timed operation. Note that at the time of writing the SO picking control file (pctrl) and the SM Bin Zones file (zones) must exist for this to be possible.

Point of Sale

Main Menu

Menu option	Form/Tab	Description
Point-of-Sale	-	**QA40909/1113 - E8 -** We have changed the way Service reminders work in Point of Sale by creating a new file called MK.remin. This is to allow reminders to be loaded in Point of sale across a shared marketing company. Reminder notices are set to ' N ' status and saved back to the MK.remin file until the vehicle returns to the dealership for more work or a routine service , the reminder is then loaded to the WIP at the new status of ' r ' for reminder. The Reminder lines can if required be set back to ' N ' to be reminded at a later date or deleted and completed as necessary. To get the Reminder notices to work you need to Create the file MK.remin. There must be a body 10 created in the parts and service formats to print lines at ' N ' status. The terminal must be set to ' S ' for a service. There is also a new field in the SO.labor file called Reminder magic which stores the magic number from the MK.remin file.

Point-of-Sale	-	**QA42346/580 - CRM -** We have enhanced the way we create new vehicles by prompting the user to search and if necessary create the target details associated with the newly created vehicle.
Point-of-Sale	-	**QA42825/870 - E8 -** New functionality has been provided to delete all lines of a menu which are correctly linked via the menu column. The rules are that labour lines must be set to either M, 1, 2, D and the Parts lines must be set to either M, P, 1, 2, D The lines must have the same Menu code in the menu column To execute the new functionality either Click on Tools and Click Edit menus, this will display the "Amend menu codes" form, now Right click on the Top line of the menu tree of the menu to be deleted, this begins with the Menu code followed by the VAT country code. Alternatively Right click the "Menu" column heading in the POS grid to activate the "Amend menu codes" form.
Point-of-Sale	Vehicle tab-More button	**QA24368/322 - E8 -** We have added a new 10 character sub-model field to Franchise data. This enables the user to filter the variant listing when creating new vehicles in Point of Sale on those models, such a light commercials, where the number of variants is extremely large. For this functionality to become effective the DD/smodl data file should be created. Initially the applicable Model Codes should be updated with the required sub-model codes. Following this the variant records that apply to the model codes involved should be updated with the sub-model codes as required.
Point-of-Sale	Additional text	**QA38121/389 - E8 -** In POS parts entry, a new check box has been added to allow you to edit the additional Sales text on a part record if present. The default for this check box is unchecked. If you check the box the text may then be edited. When you have finished editing the text click Close. The text will then be added to the wip as a labour RTS line of NOTES. **Note**: Make sure that so.text and so.logte are of sufficient size.
Point-of-Sale	Labour Details and Hourly Rates	**QA41425/1106 - E8 -** In Point of Sale, Labour details form. The "Sale code" field has been extended from the current 0000.00 (4.2) figure field to a 000000.00 (6.2) figure field. Similarly the field "Rates" (3 occurrences), accessed when the Hourly rate push button is pressed on this form, have also been extended from 4.2 to 6.2.
Point-of-Sale	Customer Word Search	**QA42662/1225 - E8 -** We have added a new facility to the main POS form, at the Customer Name field it is now possible for Service POS users to search for CRM Customers and Companies using their phone numbers. To do this enter "!" character before the phone number required e.g. "!01952297324". Note that these searches are carried out on a "stem" basis using MK phone number index data file and the entered digits should not include any "noise" characters e.g. "-()/".
Point-of-Sale	Extra Text	**QA42823/662 - E8 -** We have added a check box to the Point of sale Text form called ' Print after parts and labour ' . This will allow us to print any diagnostic text lines or notes to the foot of the invoice after the labour and part lines have been printed. Menu style invoicing must be switched on, the wpars 'menu style sort' must be greater than 0, and the check box must be ticked.

<table>
<tr><td>Point-of-Sale</td><td>Valuation</td><td>QA42681/1215 - E8 - We added a new tab called Status to the valuation form in Point of Sale. The Status tab displays the goods value , the tax value and the total value per line status on the WIP. There are seven columns which are -

M - Memo - Displays the values for all lines at ' M ' order status.
X - Already invoiced - Displays the values for all lines at X order status and X invoice status.
C - To credit - Displays the values for all lines at X order status and C invoice status.
H - Held - Displays the values for all lines at order status of H.
Invoice now - Displays the values for all Part lines at order status of P and X for Requisition. Displays the values for all Labour lines that are at ' C ' order status and ' I ' invoice status.
Invoice later - Displays the values for all Parts lines that are at ' S, V status. Displays the values for all Labour lines which are at ' W , L ,P , A and B load status.
Back ordered - Displays the values for all Part lines that are at status ' S , V ' .

Note: The existing tabs are unaffected by the addition of the Status tab and work as per previous releases.</td></tr>
<tr><td>Point-of-Sale</td><td>(for guest users)</td><td>QA41977/1242 - E8 - Various changes to the Guest User mechanism as follows: The guest user is no longer able to search for part numbers, ie cannot see the free stock. Once the first line of a WIP has been entered, the user will not be able to change the Discount Category on the Codes Tab. Once a wip has been saved, the user will not be able to call up the same wip, ie no amendments are possible. The Route field has been disabled on the Codes Tab. The Customer Contact code (Operator No) field has been disabled on the Notes Tab. The user is unable to change the Discount and the status of the part. The Required By Date on the Order TAB has been removed. The following options on the menu bar have been removed:- Tools / Marketing / Links / View</td></tr>
</table>

System Maintenance Menu

SO System Maintenance	System Parameters	**QA42664/1214 - E8 -** A new parameter "Route label" has been added. This parameter will determine the title displayed on a service WIP on the codes tab of the WIP header in POS currently named "Location". If the parameter is left as blank the field will continue to be titled "Location" , however if populated the field will take it's title from the entry made in this parameter. Additionally if Workshop loading is invoked and the "Location" form is shown when booking a vehicle in the title will also change to that of the parameter setting.

Customer Orders

Import Dealer Orders	-	**QA38740/1005 - E8 -**
View Import Log File	-	**QA42537/863 - E8 -** A new log file has been added to the system (00.SO.dorda) This is created when receiving customer orders and is updated with DEALER and CUSTORD only when dealer orders are received. New POS system parameters for log file retention days has also been added and the log files will be consolidated in the normal way using SO/CONSO.

System Maintenance

POS Parameters	Flags and Priorities Miscellaneous	**QA42374/45980/869 - E8 -** This enhancement has added the following features to the Sundries charging mechanism. 1) The Sundries Active check box has been moved to the Miscellaneous Tab on the Flags - Priorities option of the POS parameters. Sundries Active flag ticked on: If there are relevant product lines within the POS grid, the automated calculated sundries can be activated via the tools menu and clicking on the Sundries option. If this routine has not been taken, then at the time the Action icon is selected, the automated calculated sundries gris will be displayed. The user priority, will determine if the user can then cancel a Sundry charge or even amend the value of the charge. **Note**: The Consumables and Carriage routines are not shown on the Tools menu) Sundries Active flag un-ticked: The automated calculated sundries is not used, however, if a Service type terminal is used, by clicking the Tools option, the user can initiate the Consumables option. A Parts type terminal does not have access to the Consumables routine but renames the option to Carriage and uses the Carriage routines. Sundries Active flag unticked: The automated calculated sundries is not used, however, if a service type terminal is used, by clicking the Tools option, the user can initiate the Consumables option. A parts type terminal does not have access to the Consumables routine 2) A new parameter called "Sundries Override priority" has been added to the Miscellaneous Tab on the Flags - Priorities option of the POS parameters. This will prevent a user below this priority of (a) Cancelling automatic sundry charges by using the Cancel button or Un-ticking the "Load" to WIP column and (b) editing the price of the Sundry charge.

		Note: If a customer record for the account on the WIP exists in the POS customer details file with the Sundries information completed, then POS will use this information here instead of the POS parameters.

Workshop Loading

Main Menu

Menu option	Form/Tab	Description
Reload All Jobs	-	**QA43548/1206 - E8 -** We have added a menu option to the Workshop loading menu called ' Reload all jobs ' . When selected from the menu manually or in the End of day process it will reload all jobs that are at the statuses of ' Yellow - waiting to be started ', ' Cyan jobs that are waiting for parts or labour ' that are not finished in the same day. All the jobs are then reloaded as un-assigned for the technicians to be able to clock onto them the next day.
introduced in 9304B	-	**27633 - R8 -** - It is now possible to set the resources availability to the type of (+) More availability i.e. Overtime, to be now shown in the touch screen. This is done by adjusting the Resource's availability calendar to show that he is working overtime by editing his shift hours and selecting a (+) More availability reason. Iteration 31 of 9304, iteration 15 of 9304A, iteration 5 of 9304B and iteration 40 of 9090.

System Maintenance

Lock Touchscreens	-	**QA42196/12953 - R8 -** We have added a new option called ' Lock touchscreens ' to the Workshop loading system maintenance menu , this will allow the user to manually lock and un-lock the touchscreen if a problem occurs. This option is only available to Priority 9 users.
System Parameters	-	**QA42510/1223 - E8 -** We have added a new option to the WL system parameter called 'Return Keys' called 'Automatic'. When a WIP is fully invoiced and the parameter is set to 'A' it will automatically check the vehicle out (Return the Keys) the day after it was completed. With the parameter set to 'A' it will update the WIP header as described. The WL/INOUT field on the header gets set to OUT. The WL/DATEOUT will be set to today. The WL/TIMEOUT is set to 99.99. The mileage that is recorded when checked in will be the mileage that is recorded on the WIP when checked out. This will also release any courtesy car on the WIP without updating anything i.e mileage.

Environment

Advanced Analysis

SU - Timed Operations

Menu option	Form/Tab	Description
Configure Schedule	Timed Operations Schedule	**QA39745/1048 - E8 -** A new option is available in timed operations for Advanced Analysis called 'Process and Generate'. This combines what is normally 2 separate processes: Process Raw Data, which creates the formal files for each combination of profile/timeslice/dataset that has been set up for the Advanced Analysis topic, and Generate Drill Down, which creates sets of indexes for each profile/timeslice. It works in the same way as the existing Process Raw Data, except that after the raw data is copied into the formal files, the drill files are also updated. It has less impact on the machine as only the records that have changed are updated, whereas Generate Drill Down usually deletes whole drill file and recreates it.

Global Module

Front Page	-	**QA47898/15620 - R8 -** The Front Page or 'modern' style of master menu is now fully operational and the tree file structure is now much easier and faster to use.
-	Log In	**QA38036/1222 - E8 -** A new environment variable "KCMLCOMMANDLINE" has been created to enable command line arguments to be passed. This new way overcomes bugs in Windows CE that were preventing command line arguments being passed to KClient.

Report Generator

Define Report	-	**QA42107/872 - E8 -** In some modules eg Nominal ledger you can link to other files when doing an ad-hoc enquiry, by choosing the file name from the enquiries menu eg transactions, or account header. The files to link to are set up in the menu editor. Previously, there was a limit of 3 files you could link to, but this enhancement extends the number of linked files to 6.

System Utilities

Management Menu

Printer Map	Timed Operations Schedule	**QA42782/1217 - E8 -** You can now create a printer map with an output type of C so that anything sent to it will be in the paste buffer ready to be put into a notepad document.
View and Edit Set-up (Build info)	Timed Operations Schedule	**QA40313/365 - E8 -** There are 2 new options on the SU/Management menu: Edit set-up (BuildInfo) and View set-up (BuildInfo). Both options bring up the BuildInfo.txt which is normally only viewable through Unix. Edit set-up(BuildInfo) is level 9, kcc only. View set-up (BuildInfo) is level 5.

Utilities Button

Tab Menu	KCBT	**QA46806/1344 - E8 -** New menu option accessible in each module called KCBT (ADP Computer Based Training). The introduction of KCBT (ADP Computer Based Training) into Autoline enables users of the system to participate in interactive training exercises. The exercises cover key processes in Autoline in a number of module areas and are designed as either refresher exercises or as a supplement to training and new user familiarisation. An administration module within Systems Utilities allows participants KCBT activity and results to be logged and reported on using standard reporting tools.

Vehicle Sales/Customer Relationship Management

Customer Contact Management

Menu option	Form/Tab	Description
Home Page	-	**QA42907/1153 - E8 -** Cosmetic changes to the home page which include:- 1. Moving the case file access from the call list page to the make a call page. The case file button has now been replaced to provide access to the administrator. 2. Providing a screen lock which can be locked from the home page screens or can be set to lock automatically from CCM system parameters. 3. On the call statistics the Personal calls title has been changed to My Calls. The statistics bar also now shows the number of group calls on the call list.

Call Completion	-	**QA43038/1180 - E8 -** We have added the ability for users to be able to reassign calls to other members of the call centre team. A new parameter has been added to the CCM users file which can be used to determine who the user can reassign calls to.
Call Lists	-	**QA43067/1181 - E8 -** We have now allowed the ability to activate a call list as it is being generated. We have also added the ability to determine a start and end date between which the call list will be active. This has also been added to the administrator.
Call Lists	-	**QA43079/1182 - E8 -** We have added the start time / end time to the call list header to determine the time range in a day that the call list is active. This facility has also been added to the administrator.
Make A Call	-	**QA43121/1184 - E8 -** We have added a new field to the make a call page so that call centre users can see any best time to call information for that day for the customer record loaded.
-	-	**QA41841/1128 - E8 -** We have added the facility to be able to receive incoming E-mails.
-	-	**QA43169/1183 - E8 -** We have added subroutines to allow the ability to send SMS and e-mail messages from the call centre scripts.
-	-	**QA43204/1185 - E8 -** In line with the CRM development we have removed all references to Marketing and target and replaced them with CRM and customer respectively.

Franchise Data

Data Import Menu

Menu option	Form/Tab	Description
-	-	**QA58074/1694 - E8 -** Revised CAP franchise data import to handle new file structures from CAP - now supporting an Update and Convert Wizard allowing individual manufacturers data to be converted. (9304/13 and 9090/25)
CAP	-	**QA37740/914 - E8 -** Allow CAP franchise data to optionally import the CAP fleet files and put the use this to fill the fleet net code on the variant.
Variant Mapping and Conversion	-	**QA38135/1218 - E8 -** A new utility has been added to the Data import menu in Franchise Data enabling users to map from one variant to another. This is normally used when the source of the Franchise Data is changed. Once the mapping is set up in Franchise Data, the system will update the vehicle records within CRM and Vehicle Stockbooks to the new variant codes.

System maintenance Menu

System Controls	-	**QA413123/12173 - E8 -** System Controls have been added to the franchise data module, this is to enable the saving time when saving the Build specification form back. Previously, every-time you made a change to the build specification and on exit, would have to wait a length of

Incident Management

System Maintenance

Menu option	Form/Tab	Description
System Parameters	-	**QA37464/414 - E8 -** New field has been added to the system parameters of the IM menu to allow the credit limit to be over-ridden (to set the priority to create event if the account hasn't got enough credit). Also the system stops the user from creating an event if the account is put on hold!

Vehicle Stockbooks

Main Menu

Menu option	Form/Tab	Description
Vehicle Administration	-	**QA43284/1188 - E8 -** When entering Showroom or VSB for the first time after restart/backup we now show a progress gauge to indicate the reboot of the locator, otherwise it appears that the screen is frozen.
Vehicle Administration	Open-Filter	**QA43165/642 - E8 -** This enhancement has been added; leaving the current 'Word search' and 'Start search' button functionality in vehicle stock-books in place; and simply adding a 'Filter search' button. This allows the user to specify the 'Locator' fields required to filter

Vehicle Administration	Definition	**QA42696/722 - E8 -** This enhancement is replacing a feature that was removed when the rev8 was introduced. The chassis number has been added to the definition tab. This allows users to enter the chassis on the definition tab, this will complete the franchise, model & variant
Vehicle Administration	Finance	**QA43152/645 - E8 -** The facility to view allocated payments against vehicle documents produced from within the vehicle Administration. Within the Finance tab, this has been enhanced slightly, if a right click is performed on the invoice an additional option to display of allocated payments against an invoice/credit note has ben added.
Vehicle Administration	Invoicing	**QA42611/1136 - E8 -** A warning message has been added to assist users, in relation to vehicle Deposits. When performing an invoice in vehicle stock-books additional form(s) have been added. These allow users to add a deposit after choosing the print option when producing an invoice.
Vehicle Administration	Inter-Company Transfers	**QA43338/1073 - E8 -** This enhancement is for ICT's. A message has been added to prompt users to print purchase invoice.

Miscellaneous Options Menu

Menu option	Form/Tab	Description
Account Status Codes and Progress Codes	-	**QA42928/648 - E8 -** A Filter has been added to the account status codes and progress codes in VS programs based on a new flag indicating if applicable to 'New', 'Used' or 'Both' vehicle types. A one character field called 'VTYPE' (vehicle types) has been added to both of the forms.
Detailed Posting Tables	-	**QA42701/1070 - E8 -** In the Detailed Posting Tables program, the Delete table button is between the Amend table and the Save table, so it is quite easy to click it and there is no warning message before actually deleting the table. A message has been added when deleting items

Previous Vehicle Codes	-	**QA42689/643 - E8 -** When selling a vehicle that has been used for Driving School, Taxi etc, it has been decided that a new table is to be added to vehicle administration. The CAP pricing code on the Identity page will be removed as it actually duplicates the CAP code on the Definition page. It has been replaced by a three-character code, described as 'Previous usage code'; with a look-up to a new table in Vehicle stock book describing the previous usage of the vehicle. The new 'Previous usage' look-up table (VS.usage) will have a multi-lingual; with a 3 character code and 30 characters description. It is maintained by a GB edit option, which has been added to the miscellaneous options menu. Also three occurrence field have been added to the VS system parameters on the 'Other parameters' TAB, for the previous usage code to apply on transfer, one for each transfer type. The field has a dropdown to the new VS.usage table. When transferring a vehicle, the previous usage attached to this transfer type will be assigned to the used vehicle record. So if Transfer type 1 is used from demonstrator vehicles, and the relevant previous usage code is DEM then we would insert that.

System Maintenance

System Controls	-	**QA42706/715 - E8 -** Additional fields have been added to the vehicle system controls form, this allows users with a priority 9 only to see who last generated the master posting table, on what day, at what time.