Autoline Release Notes

Revision 8.35.9304

Contents

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Introduction

These 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 8.35.9304 release.

Icons have been included to highlight the following:

Notable features and special enhancements.

 Enhancements that may require further training.

 Enhancements that require parameter, system utility or configuration changes.

System Requirements

Connection Manager, offering greater reliability and functionality over telnet, is the only recommended connection method for systems running KCML6.

Available memory should be 10 MB per user.

Windows 2000 and Windows XP are the recommended operating systems for PCs that run Kclient. Earlier Windows products unsupported by Microsoft are no longer endorsed as recommended platforms for KClient.

For optimal screen displays, we suggest screen resolution be set to 1024 x 768 on hardware that will support this.

- **KClient version used for KCC 9304 testing** - version 06.20.00.9050 - or newer
- **KCML upgrade used for KCC 9304 testing** - version 06.20.00.9050 - or newer
- Licence upgrade to include an Autoline Unrestricted licence
- 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/kcml/06.20/

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.

Note: New CRM and OCX integration with Outlook requires MS office XP (otherwise known as MS office 10 or MS office 2002)

New Menu Options

CRM

- 1717 Additional option from the file menu and on the tool-bar to close a contact simply by prompting for 'notes' and describing why this action has been taken.

Point of Sale

- 1442 New 'Clone nominal codes' menu option.

System Utilities

- 1344 New 'KCBT' menu option.

Accounts

Nominal Ledger

Main Menu

Menu option	Form/Tab	Description
Insert NL Journal Entries	-	**1427 - E8 -** This enhancement introduces an additional date field (Document Date) to the various input Journal routines and makes all the necessary changes to the display facilities to display this additional date field. This has only been done to the new style of Journal form in the NL/JPOST program. *In previous releases of the software, a significant amount of development has been done to improve the Nominal Ledger Posting facility. In the 9304 release, this has been further enhanced to include an input field for the document date. Document date was deemed to be important since this may be significantly different to the posting date.

Cash Book Menu

Display Cash Book Reference	-	**1258 - E8 -** This Enhancement replaces the Payment Method with the Journal Reference field in the Display Cash Book Reference option on the Cash Book menu. *The Cash Book within the Nominal Ledger, which has had a significant amount of development done in previous releases, has been further enhanced in the 9304 release. Now, after having selected the Display Cash Book reference menu item, the grid on the form has been changed to replace the Payment method column with the Journal Reference. This makes the traceability of the reference easier.

System Maintenance Menu

Document Numbers	-	**1428 - E8 -** This enhancement introduces a Warning message and a facility to correct the creation of Document Number ranges. (Over lapping number ranges exist do you want to amend). **Note**: There is a Country Specific element to this for Germany whereby they will not be able to leave the procedure until any Over lapping ranges have been corrected.

Purchase Ledger

Main Menu

Menu option	Form/Tab	Description
Batch Input of Documents	-	**1491 - E8 -** This enhancement changes the sort sequence of the documents initially displayed when using the 'Import' button in Purchase Ledger Batch Input of Documents. The documents are now sorted by document number to make it easier to identify specific documents. *There is a standard facility that is found in the Batch Input of Documents within the Purchase ledger that allows for supplier document details to be imported into the system. In order to improve this invoice registration process, the import file is now automatically sorted by document (invoice) number. This will make it easier to locate individual invoices within an imported batch.

Reports and Enquiries Menu

Aged Debt/Creditors	-	**1094 - E8 -** The enhancement allows you to produce an Aged Debtors or Creditors Analysis report by posting date in addition to either Document and due date which were already available. *The Aged debtors report within the Sales ledger and the Aged Creditors report in the Purchase ledger, have been modified to allow for the reports to be generated using the Nominal Ledger posting date as an additional sort criteria. This will give more flexibility when reporting on the ageing of the Debtors and Creditors. This does not change the original sort criteria of either Document date or Due date, that was previously used.

Sales Ledger

Reports and Enquiries Menu

Menu option	Form/Tab	Description
Aged Debt/Creditors	-	**1094 - E8 -** The enhancement allows you to produce an Aged Debtors or Creditors Analysis report by posting date in addition to either Document and due date which were already available.

System Maintenance Menu

System Parameters	General	**1406 - E8 -** This enhancement introduces a new system parameter in the Sales Ledger to priority control the Enabling/Disabling of the Refund button within the 'Take Deposits' option on the Sales Ledger Main Menu. *In order to improve security when handling deposits in the Sales ledger, priority control has been given to the enabling or disabling of the 'Refund' button that is found on the Menu bar within the Take Deposits facility. This will allow management to empower only certain users to refund any deposit previously taken.

Display Accounts

Menu option	Form/Tab	Description

Sales Ledger/Display accounts/Enter account number/Click Transactions Tab/Highlight a transaction line/Click Allocations	-	**47056 - R8 -** The Document button will no longer be available when displaying allocated cash transactions. This is because no document is printed from Point-of-Sale at the time of processing the cash allocation and therefore there is no AK reference generated on the transaction record.

Spreadsheet Interface

Main Menu

Menu option	Form/Tab	Description
Edit Rows and Columns	-	**1263 - E8 -** This Enhancement allows the user to sort an interface file by the key fields or the row and column fields simply by clicking on the column heading. Additionally they can toggle between forwards and backwards sorts also by clicking the column heading. It also allows the user to do a specific or contains find on the key columns. *The Edit Rows and Columns menu option within Spreadsheet Interface is used to determine where in an exported spreadsheet, values will occur. Additional sort and navigation functionality has been developed to make the editing easier. The user now has the ability to sort the selected interface file by clicking on the column heading within the edit screen. Navigation such as backwards or forward can also be selected to display the file in the desired direction. In addition, there is now a parameter to allow the user to customise the default sort option that is used on entering the edit facility. This can be found in the Spreadsheet Interface system parameters. see also 1266

System Maintenance Menu

System Parameters	General	**1266 - E8 -** This enhancement introduces a new system parameter which controls the default key sort order in which the interface file is sorted when it is initially opened.

Aftersales

Standard Reports

Menu option	Form/Tab	Description
-	Amendment of aftersales standard reports	**2356 - E8 -** This enhancement Adds/Amends approx 100 existing or new consultants reports for all modules that were on various laptops or userdefined menus. Those deemed best or most useful have been colated and added to standard reports menu. Where necessary a new help file was created or an existing one amended. The modules covered were SC,SO,SM,WL & PC.

Purchase Control

Main Menu

Menu option	Form/Tab	Description
Purchase Control	-	**1236 - E8 -** In Purchase Control the purchase transaction file has always held a line number for each part number on an order. This enhancement has been created in order to display this line number as the first column within the purchase control grid. You may notice that both the GRN number and product fields have been truncated to accommodate the new field. The GRN number field is still 14 characters as before. *To help those customers who create very large orders, the line number has been added to purchase control grid as the first column.
"	Generate Stock Order	**1256 - E8 -** In Purchase Control this enhancement has extended the Re-order categories field on the Generate Stock Order screen, so that the exclude function can use up to 26 characters if required. *Within the Generate Stock Order routine there is now the facility to exclude up to 26 different reorder categories giving full flexibility in terms of generating the order when using the reorder category field.

"	-	**1269 - E8 -** In Purchase Control a purchase order whose order status is at 'N' for New Order will have its status changed to 'P' (for printed) when the purchase order has been 'submitted' to the supplier. *In order to mimic the order process, those purchase orders that have been submitted to the supplier will now take on the status "P" for printed. Currently they remain at status "N" for New which is confusion
"	Transfer Receipted Stock	**1270 - E8 -** In Purchase Control, within the option 'Transfer Receipted Stock', the 'Toggle Items in list' form which is displayed after entering the search criteria in the 'Transfer Receipted Stock Order' form, will now show the Purchase order lineNos.s of each part on the purchase order. *To help usability the line number for each part on a purchase order has been added to the Toggle Items from in the Transfer Receipted Stock routine.
"	-	**1275 - E8 -** Within the Purchase Control grid, this enhancement will now highlight the Product field on order lines that have a current Special Buy price by using a solid grey background within the PC grid. In addition, the stock card form at the top of the purchase control grid, now shows the fields Special Buy Price, and the Special Buy End Date. These fields are populated when the cursor is focused on an order line which has these values held in the part number record. There are also tool tips describing the field in full. *To help users identify those parts within a purchase order that are subject to a special buy price, the background for each of these parts lines will be grey in the purchase control grid. Additionally, the special buy price information (Special Buy Price and End Date) will be displayed in the purchase control header when a parts line is highlighted within the grid.

"	Header Icon	**1280 - E8 -** In Purchase Control, if the Summary' button on the Purchase Order Header form is clicked the value of the order was displayed showing the Total retail and the Total cost value of the order. This enhancement will now also display the Surcharge totals value separately, if there are any surcharge lines on the order. If the POS parameters have the flag 'COS surcharge' switched off, the Summary form will display the Total retail value, Total surcharge, Total cost value. If there are no surcharge lines on the order, then only the Total retail value and Total cost value lines will be displayed. If the POS parameters have the flag 'COS surcharge' switched on, the Summary form will display the Total retail value, Total sale of surcharge, Total cost value, Total surcharge. If there are no surcharge lines on the order, then only the Total retail value and Total cost value lines will be displayed. **Note**: Surcharge values are not included in the Total retail value and Total cost value totals. *To provide a more accurate reflection of the purchase order value the Summary button routine has been refined to display Surcharge values separately where parts lines with a surcharge exist within an order. The summary values will now show parts values, and surcharge values separately and then a total. Where the surcharge cost of sale facility is used and a retail price is levied to a surcharge part, this is then displayed within the Surcharge summary.
"	-	**1281 - E8 -** Purchase Control / Purchase order header search. A short name search has been added to the purchase order header form. If the ellipsis button is pressed on the order number field you will be offered the following choices: Search by Account or Search by shortname The search by account is unchanged. The shortname search functions as per usual shortname searches throughout the Autoline system. For example the first letter or several letters will retrieve a list of matching shortnames, add more letters to refine the search.

		*To accelerate the identification of purchase orders, ability now exists to use the short name search alongside the existing search by account.
"	Generate S/O	**1351 - E8 -** This enhancement has streamlined the process of printing a suggested order, and replaces the old option "Suggested stock order" found on the PC Reports & enquiries menu. The Generate Stock Order form, has three new Action check boxes, "Display" "Print" and "Generate". These three check boxes can be activated to: • To display a suggested order (an order not yet created) • To print a suggested order (an order not yet created) • To generate a new order (with an order number) Any of the check boxes can be used in any permutation. So the Print check box may be printing a suggested order, or it may be printing the stock order that is being created, depending on whether the Generate check box is also ticked. If the Display check box is used with the Print option, the print is not released to the printer until the Display is closed on the screen. There is also a new format stationery PC.K99.fs which replaces the old report generator report - Suggested Stock Order K02 and the program code which used to print the Genearted Stock Order. The format of the report has changed slightly providing two heading lines and some additional data. **Note**: that the correct Archive Type (K99.fs) must be set up for this to function correctly. Also this requires the document archive type of "PC" to be created before this will work.
"	-	**1431 - E8 -** Purchase control Main form. This form has been enhanced to display supercession information where available . Supersession 'From' and 'To' fields are displayed in place of the picture to the right of the existing stock information for the chosen part. The fields displayed are the SUPFROM and SUPER fields from the SM Stock file. **Note**: The display of this information is dependant upon the screen resolution being set to higher than 800 x 600 and the form being maximised. *In order to provide relevant supersession information for parts on order, the purchase control header now displays the superseded from and superseded to information where applicable.

"	Verify Received Invoice	**1433 - E8 -** In Purchase Control, Verify received invoice. An enhancement has been made to the 'Line Matcher' tab. On first entering this tab the selection displayed will be as now, the GRNs Del Note numbers as entered in the Delivery note / Purchase Orders tab. However, it is now possible to sort the selection as follows: Click the PO/GRN heading on the possible matches grid. The selection will now display in alpha numeric order. Click again and the display is reversed. Further clicks will simply cycle between a forward and backward sort of the selection. *To further assist the user when using the Line Matcher facility within Invoice Verification, both grids can now be sorted in Purchase Order / GRN Number order. Additionally, these sort sequences can by changed by clicking the column to cycle through all the sequences available.
"	-	**1514 - E8 -** The Purchase control system has been adjusted to provide the ability to hold additional manufacturer-related parts ordering information against the purchase header involved. If applicable an additional tab, named 'Manufacturer details' will appear on the Purchase Order Header form. At present this enhancement is only visible on user systems where Chrysler Jeep Manufacturer Specific Software is installed and is required as part of the DealerConnect Parts Ordering development. For more details please see separate document describing the DealerConnect functionality.

Stock Checking

Menu option	Form/Tab	Description
Stock Checking	Input Stock Count	**1277 - E8 -** Within the 'Input stock count' option in Stock checking, this enhancement has added a check box described as 'Show parts with Variance Only'. The default status of the new check box is un-ticked. (Standard view) If this box is checked, then the display will only show lines from the check file that have an input quantity entered, and that quantity is not equal to the frozen quantity. The display will not show lines with a variance if the line has been updated against the stock file. *To accelerate the input of Stock Check variances there now is a check box that will display those parts that show a variance to the original frozen stock quantities. This also ignores those lines that have not been updated so only those lines that have been checked are displayed.

Stock Management

Main Menu

Menu option	Form/Tab	Description
Stock Management	Display Stock Card	**1273 - E8 -** In Stock Management, Display stock card, Movement tab. The WIP no field displays the GRN number if the movement is the result of a purchase. If the GRN No is greater than the 10 character display of this field a 'Tooltip' will pop up, displaying the entire contents of this field. *To help trace stock movements for purchases the WIP No field will now display the GRN Number. Where the GRN Number is longer that the character display offered within the movements grid a Tooltip utility will display the entire GRN Number when the mouse is hovered over the relevant grid cell. Stock movements relating to Sales will continue to display WIP number.
"	System Maintenance Stock EOP update	**1434 - E8 -** This enhancement allows the Dealership to determine when a part is moved to the Obsolete category while SM/EOP is run in either the EOP mode or NON EOP mode. The enhancement also allows the Dealership to choose the Reorder letter that should be used for the obsolete category. **Note**: Notes below, assume that the ROCAT file is not in place. There are new parameters held in SM System Parameters file on the Other tab. ▪ Obsolete Reorder cat: (OBREOCAT) This will override the hard coded obsolete reorder category of 'O' ▪ Obsolete Min qty requested: (OBMINREQ) This is the minimum number of requests, which will cause the part to be moved to the obsolete reorder category. If the number of requests on the part record is equal to or less than the value held here, then the part will be deemed to be potentially obsolete. If this value is set to zero, then a default value of 3 is set. ▪ Max Obsolete periods: (OBMAXPER) This is the number of periods of history that is checked to determine if a part is obsolete. If this value is set to zero, then a default value of 12 is set. ▪ Min req override for new lines: (NEWREQ) This parameter is specifically used for reorder category 'N' new lines. If this field is set to zero, then a new line Category 'N' of sufficient age, will be categorised

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by using the fields OBMINREQ and OBMAXPER If this value is greater than zero, then this value will be used over the Max Obsolete periods value, to determine whether the part (New Line) should be moved to a moving category or the obsolete category. If the requests is equal to or less than this value, then the part will move to obsolete.
Minimum month no movement: (MINNOMOV) This field is used as a second test described as follows: Over the number of periods held in this parameter, is the accumulative total of units (History) including negatives, equal to or greater than 1? If this value is set to zero, then a default of 3 is used.

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<td>System Maintenance Stock EOP update</td>
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1545 - E8 - This enhancement is wholly dependent on stock management having the SM.rocat file in place. It will work in conjunction with the new SM system parameters described in Enhancement 1434.
The two additional parameters on the rocat file allow the Dealership to Define/delay the period of time when a part is moved to the Obsolete category while SM/EOP is run in either the End of Month mode or Non EOP mode.
The dealership will be able define the rules at reorder category level, thus being able to use one rule for very slow and expensive items (engines) and another rule for fast moving cheap items.
You must remember these two new parameters are additional to SM system parameters, and are merely used to delay the time when a part should be moved to the obsolete category. The parameters are described below:

Minimum request: (MINREQ) This is the minimum number of requests, which will cause a part to move into obsolete. EG: Assume the field 'Max obsolete periods' in the system parameters is set to 12, the first test of the routine will check the number of requests of the part over the period of 12 months (Max obsolete periods), and compare it with this value in 'Minimum request'. If the number of requests is equal to or less than this parameter 'Minimum request' then the part line is deemed to be potentially obsolete.
Minimum month no movement: (MINNOMOV) The second test checks that there is at least one request over the number of periods held in this parameter, months no movement. If this test is not satisfied then the part line is deemed to be potentially obsolete.

If the part line fails one of the two tests, then the part will move to the obsolete category however a further test is performed using the stock management parameters which may mean that the part is taken out of Obsolete back into a moving category. The SM test checks if NN Requests (Obsolete Min qty requested) have been made in the last NN months (Max obsolete periods). If the test is true, then the part will be moved to a moving category dependent on its Average Month Demand and price ranges held in the rocat file.
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Point of Sale

Main Menu

Menu option	Form/Tab	Description
-	-	**1261 - E8 -** Point of sale, WIP form grid, the menu options offered when a right click is made on the progress column contains a new option, Convert R status lines to P status, if status 'R' lines are present on a WIP. This allows the speedy conversion of all 'R' status lines on a WIP to 'P' status. *There is now a time saving method to convert all "R" status lines on a WIP to status "P". By simply right clicking the status column, a menu of options is presented of which is to convert all "R" status lines.
-	-	**1262 - E8 -** Point of sale. An enhancement has been made such that when opening other modules from within Point of sale, for example Stock file operations, the priority to carry out those operations will be derived from the GB Permissions and Security for that operator's user ID and not the POS priority. This is to ensure that the operator uses their true priority for the module they are using.
-	-	**1264 - E8 -** Split contributions grid to allow parts and labour lines to be split 3 ways has been increased to default as a 5 way split. This will then allow those split lines to be split again up to 5 times as long as value of each split is greater than 1% of original value. The ability to use the value field to split line rather than just % field allows it to be set by value.
-	-	**1272 - E8 -** In Point of Sale, the search for WIP has been enhanced to include an additional criteria of a specific creation date search. Also the ability to refine the search by department is now available. The grid is also now, by default, sorted by date order, newest first. The ability to restrict the search to a Department(s) is determined by the setting in SO.terms. A drop down selection is available offering 'P'arts 'W'orkshop or * All . The selection offered and the order in which they are displayed is determined by the default department parameter setting in SO.terms. *There have been several new features added to the WIP Search routine to help reduce the time taken for identification, these are: 1) The WIP creation date is now a search criteria, 2) the default sort order is in creation date order with the most recent date first, and 3) There is also a department drop down selection to added to the search criteria and this defaults to the terminal setting

		so a Parts terminal would, by default, only display Parts WIPs but this can be changed if required.
-	-	**1278 - E8 -** We have added the ' User ID and Terminal number ' to the warning message in Point of sale when a vehicle record has been looked by another user in CRM. *To help overcome the record locking conflicts between departments, when a vehicle record has been locked by CRM the User ID and Terminal Number are now displayed on the error message so that the appropriate persona can be identified if immediate access is required to the vehicle record.
-	Order Tab	**1279 - E8 -** In point of sale, orders tab of the WIP header, the creation date of the wip is now displayed. The field cannot be amended. *In order to quickly identify the age of a WIP, the Creation Date is now displayed on the Order tab within Point of Sale.
-	"	**1283 - E8 -** This tab has been enhanced to include a new field 'Jobcard no'. This field displays the associated job card number for the WIP if a job card has previously been printed.
-	Other Jobs Exist Form	**1276 - E8 -** We have added the Department code to the ' Other jobs exist ' form, this will make searching for WIPs much easier especially when there is more than one department. *Similar to the enhancement made to the WIP Search form, the Other Jobs Exist form now has the facility to identify the department making filtering these WIPs easier and more relevant to the appropriate department.

-	Text Tab	**1435 - E8 -** Manufacturer Systems, 00, Standard RTS Codes. An enhancement has been made to the Text tab to enable the Sales text to be shown and or printed in POS. In similar fashion to the sales text for a part if sales text is added to an RTS code when the RTS code is used in Point of Sale a Pop Up form is displayed showing the text held in the RTS code text tab (00.MS.rtsco). The text displayed may also be added to the WIP for printing and additionally be amended if required by checking the 'Add sales text to WIP' in the bottom left corner of this form. This will immediately make the text amendable by overwriting or adding to the existing text. **Note**: Any amendments made here will not be written back to the 00.MS.rtsco file it will be specifically for the WIP in question only. Click close to add the existing or amended text to the WIP. A Notes line will be added to the WIP containing the text entered.
-	-	**1437 - E8 -** Labour discount map not found message will no longer be given if no other franchise specific labour rates exist. This checks there is a franchise labour rate table for 'abcdefghijkmnopqrstuvwxyz' if none found then no error message is given.
-	-	**1440 - E8 -** The Confirm Picking Notes routine now has the Line Number (from the wip) added to the search criteria, so that the operator can select a specific Line/Part from a large Picking Note No or WIP No. This will enable the searching for parts within the Confirm Picking list whilst editing quantities, to be less tedious and save time. *Within the Confirm Picking Notes routine, and in the scenario where there is a large number of lines on a WIP, the line number added to the search criteria making these process quicker and less tedious whilst editing quantities.
-	-	**1441 - E8 -** This enhancement gives a clearer message to users that POS costs have exceeded estimated costs set in VSB and tells users to have VSB costs updated before proceeding.
-	-	**20406 - R8 -** Within the Main and Additional Tasks screens of the WIP creation wizard the 'Price (incl. VAT)' column has been added to show the price of the product including VAT. For clarity the existing Price column has been re-labelled to read 'Price (excl. VAT)'.
-	Order Tab	**32915 - R8 -** On the Selection criteria form (batch invoices/credits), the field named Between has been changed to Due in/Required. The "Due in" and the "Required" dates are used for searching Workshop job cards, and Parts WIPs respectively. The Scan for WIPs process will use the Due-in date, however, when searching for Parts WIPs, if the Required date is blank, then the Creation date is used. The Date field called Required is only described as Required if the Depot is not a Warehouse.

-	-	**38086 - R8 -** If the account used on the WIP is a Delivery Control type, an invoice can only be printed if each zone line entry in the Edit Order form is set to I status, and a delivery note has been printed. The printing of the invoice can be performed from either within the Edit order form, the Parts Delivery Control form or Point of Sale. The headings S and Z in the Parts list window have been replaced by St and Zone. The form is displayed when the Parts list button is selected.
-	-	**38484 - R8 -** Changes to SO/loghd so that: At 95% the operator is warned when entering POS, at 95% the file is nibbled down to 85%, at 96% the Administrator is warned via the EOD report, at 97% POS users are prevented from accessing POS, the days retention held in this file is 400 days. The above rules apply to all the 9304 packs up to 9304C. Please also see issue number 38723 (larch file).

Miscellaneous Options Menu

-	Franchise Defined VSB Accounts	**1436 - E8 -** This enhancement has created a new table in point of sale which makes it possible to default individual SL accounts for new and used vehicles depending on Franchise code of vehicle. If no table entry for Franchise code found then SL account defaults to SO wpars default VSB account. *For larger multi-franchise sites where internal VSB repair accounts are used on a franchise level, there now exists the facility to specify these as defaults by franchise as opposed to having just one internal VSB account.
-	Text Tab	**1439 - E8 -** On saving wips if every single labour line is at loadstat D and every single part line is at ordstat D then wip will be set to U retain type which is the 1st number of days to retain box in SO System parameters. In the past estimates would have set retention to 4th box for days to retain but now if users go back and delete all labour and parts lines leaving none at memo status then wipno will now be deleted on 1st number of days to retain box. Normally this is 1 or 2 days by default. *To reduce the number of retained WIPs that have no relevance as all the lines have a deleted status, there exists a parameter to determine the retention days for this scenario.

-	Clone Nominal Codes	**1442 - E8 -** Point of Sale, Miscellaneous options, Clone nominal codes. A new option has been added to the SO/ Miscellaneous options menu. This enhancement provides the facility to clone (copy) an existing set of nominal codes and create a new set for a new franchise in a single operation. Upon selection of this option you are offered 'From franchise' and 'To franchise' selectors. Both fields have a drop down menu selection facility. The 'From franchise' displays all available franchises, whilst the 'To franchise' displays only newly added franchise codes. **Note**: A new franchise letter must have been added to the Nominal permutations 'Franchise codes' before cloning can take place. Two radio buttons are provided, Parts and Labour, thus determining whether the Parts nominal codes or Labour nominal codes are selected for cloning. Once the from franchise letter has been selected the grid displays the set of nominal codes related to that franchise letter. For information purposes each permutation may be clicked in order to further display the Balance sheet / Profit and loss nominal codes associated with the selected permutation. When happy with the selection pressing the 'Clone' button will copy the entire set of nominal codes selected to the new franchise for either Parts or Labour. Before commencing this operation ensure that the SO/nomin file is large enough to handle the required number of new records, and extend if required. No actual harm will be done if this is not carried out, should the file be too small, the system will simply write the number of records available and issue a warning with regard to the number of records that could not be cloned. These will then need to be attended to manually.
-	Edit Customer File	**1443 - E8 -** As you may know the Fixed price flag in POS parameters is no longer used. If a fixed price is required, then the operator must tick the flag on the Parts Details form, unless the price/discount is edited and the field will be ticked automatically. This enhancement has introduced the 'Allow fixed prices' flag held in the custf record held in POS/Misc/Edit customer file. With this flag switched on in the Customer record, when a part is loaded for that customer, the theed price flag is automatically switched on as a default, on the parts details page in POS. *In order to make the use of fixed prices more flexible the global "Allow Fixed Prices" parameter has now been disabled and replaced with the same parameter that can be applied at a customer level. Working on the basis that this is the exception rather than the rule it is more controllable to enforce this

		by customer.
-	Operators	**1470 - E8 -** This enhancement will force certain flagged operators to only create wips via CRM upsell process. When the point of sale operators record details has the new CRM wizard field set to yes, they will be unable to create a wipno from point of sale unless wip wizard functionality is used.
-	Depots	**16663 - R8 -** This enhancement will allow ICT requests to be flagged as Low Priority requests, to differentiate between the normal ICT requests which are deemed to be urgent. A Low priority request (within the View icon in POS) can be identified on the ICT List because they are written in BLACK. All other normal ICT requests are written in RED. A new field called 'Low priority SL account' in the depot file has been added, to hold the SL account that this requesting depot must use in order to generate a Low priority request. The requesting depot must set the SL account on the WIP to this same account number. This functionality used to be in Rev7 and was used for one depot to replenish their stock from another depot.
Introduced in 9304C	Discount tables	**36149 - R8 -** This issue has changed the discount percentage image from 3.2 to an image of 2.3.

System Maintenance Menu

System Parameters	-	**696 - E8 -** We have added a new System parameter called ' Special document numbering ', which adopts single threaded printing to stop document numbers being lost when the system crashes. In Italy and France the printed document contains a government produced invoice sequence, which means no document produced from Autoline can be out of sequence within the government range. Only one printer can be utilised to produce these government documents the printer is locked at the point of invoice and can only be released by the user accepting that the print has been produced successfully, this procedure will be considerably slow to produce an invoice due to locking the invoice numbers table within the nominal ledger. France is currently using this function but not by way of a system parameter, we have now introduced the system parameter to allow other users to use the same functionality by activating the parameter. *In order to support the requirements of some markets we have created the facility to maintain consecutive invoice sequences using a new system parameter (Special document numbering) that enables single threaded printing to stop document numbers being lost in the event of a system crash. In some markets the printed document contains a government produced invoice sequence, which means no document produced from Autoline can be out of

		sequence within the government range. Only one printer can be utilised to produce these government documents the printer is locked at the point of invoice and can only be released by the user accepting that the print has been produced successfully, therefore this procedure is rather slower to produce an invoice due to the requirement to lock invoice numbers table within the nominal ledger.
"	Flags and Priorities, Printing tab	**1267 - E8 -** Point of Sale, System Maintenance, POS Parameters, Flags and Priorities, Printing tab An enhancement has been made to the Point of Sale parameters (SO.wpars) for the Print to follow items parameter (PTRFOLL) This change is to enable Delivery/Requisition notes to print 'To follow' items if required. The following options are available from a drop down menu for this parameter: 'Y' To print to follow items on Invoices only. 'D' To print to follow items on Delivery notes or Requisitions. "B" To print to follow items on both Invoices and Delivery/requisition notes. 'N' To not print to follow items at all. **Note**: The printing of to follow items is dependant upon the format stationary for delivery notes and requisitions being amended to include the relevant fields and any associated text. *In an extension to the current functionality for invoices, there is now the facility to add "To Follow" items to delivery notes and requisitions. For complete flexibility there are four options available, 1) Print no to follow items, 2) Print to follow items on invoices, requisitions and delivery notes, 3) Print to follow items on Invoices only and 4) Print to follow items on requisitions and delivery notes only.
"	-	**1274 - E8 -** We have enhanced the way that the point of sale parameter called ' Default load status ' for auto completing labour lines is currently working. When the default load status parameter is set to ' C ' for complete and a labour line is loaded onto the WIP, if the allowed time is zero the labour details form will be opened and the focus set to the Allowed time field for the user to populate before the auto complete process is completed. *For those customers who make use of the auto-complete facility for labour lines (and by implication do not use Workshop Loading) there are some time saving enhancements added to this routine. When a labour line is added to a WIP, and if the allowed time is zero the labour details form will be opened and the focus set to the Allowed Time field for the user to populate before the auto complete process is completed.

"	-	**1285 - E8 -** We have enhanced the way that the Point of sale system parameters ' Default load status and Default mechanic ' for auto completing labour lines are working to make them work independently of each other. If the parameter ' Default load status ' is set it will default the Allowed time to the Taken time field and set the labour line to the status set in the parameter, and open the labour details form. If the parameter ' Default mechanic ' is set it will change the labour line status to ' Complete ' and default the Allowed time to the Taken time field and set the Technician number to the technician set in the parameter and auto complete the labour line. If both of the parameters are set it will set the labour line status to the status set in the parameter, it will default the Allowed time to the Taken time field and it will set the Technician to the Technician set in the parameter and auto complete the labour line. *For those customers who make use of the auto-complete facility for labour lines the ability now exist to separate the parameters for Default mechanic and Default Load Status. In both situations the Taken Time is set to the Allowed Time and but the Default Status and Default Mechanic can be used independently or in tandem. For a fully automated approach, with only the labour details from requiring confirmation, a default mechanic, plus a default status of C for completed would be the optimum
"	-	**1471 - E8 -** The Loan car option in Wip wizard will default a tick into the Courtesy car check box on the Workshop tab with Workshop loading switched on or on the Order tab if Workshop loading is switched off. This will then call the loan vehicle diary when loading work into workshop loading or using the Courtesy car icon. **Note**:Note: When selecting any loan car option from Wip wizard the courtesy car check box will be checked, if a car is not required then remove it from the courtesy car check box.
"	-	**1414 - E8 -** The Point of Sale parts discounting logic with regard to new and old units that carry a surcharge amount has been extended so that the percentage discount normally given to the customer will be applied to the 'Sale of surcharge' figure as well as the Selling price. A new setting has been added to the Surcharge group box on the 'Parts 2' tab of Point of Sale parameters, named 'Allow discount surcharge parts' , it must be ticked for the enhancement to be activated. In addition the existing Point of Sale parameter 'COS surcharge' must be ticked.

"	-	**19294 - E8 -** We have increased the number of characters available for the descriptive text associated with each of the five user-defined buttons/reports that can be setup via Point of Sale Terminal Details and System Parameters. There is now room for approximately 30 English characters in Point of Sale and Purchase Control and 11 English characters in Stock Management. *For increased user ability the descriptive text associated with the five user defined reports have been increased. There are now 30 characters in Point of Sale and Purchase Control and 11 characters in Stock Management.

Other

Sales Ledger/Display accounts/Enter account number/Click Transactions Tab/Highlight a transaction line/Click Allocations	-	The Document button will no longer be available when displaying allocated cash transactions. This is because no document is printed from Point-of-sale at the time of processing the cash allocation and therefore there is no AK reference generated on the transaction record.
Point of sale form > New product > Enter part > Supersession Chain	Supersession Chain Form	**R8/46969** The Supersession Chain form is easier to use than in previous releases. The toolbar and File menu contain an **Exit** facility and the grid has a **Stock quantity** column that contains the total free stock. The Supersession Chain form appears if either of the following circumstances apply: 1. When a part does not exist in the Parts Stock file 2. When a part that currently has zero stock, backorder and purchase order quantities is entered in the **New product** field on the main Point of Sale form and a record exists in the Parts supersessions data file for the franchise in the Manufacturer systems module. The generic Supersession Chains product (00PSS) and the appropriate franchise-specific product (REPSS, for example) must be installed and set up on the system. Help file update: MS_00_SO_CHAIN.html

Workshop Loading

Menu option	Form/Tab	Description
-	-	**2041 - E8 -** (iteration 30 onwards) A ADP workshop clocking device has been developed as an alternative to KABA clocks, it supports 24hr clocking and is available offline when the end of day is running. This is handled using SOAP software that buffers the data when the server is offline and then downloads the clockings when the server is back online updating the clock file and WIPs. The same program can be used on different devices such as - touch screen, a PC with a barcode reader and PDAs. Additional hardware will be required to utilise these features.
introduced in 9304B	-	**27346 - R8 -** We have now changed the way WL Reload all jobs (EOD or from the jobs forms) works. A single task that rolls over several days will only put the previous days loading into unassigned and not the whole task, this also includes several tasks on the same WIP where certain lines from the previous day have not been completed only these tasks will be loaded to unassigned and not any future loadings for the WIP. Iteration 33 of 9304, iteration 17 of 9304A and iteration 7 of 9304B.
introduced in 9304B	-	**28189 - R8 -** We have added a pop up menu ' Add to unassigned tasks ' on the Load form in workshop loading. This allows the user to load work to unassigned without having to open the Day form, the benefit of this option is to speed up loading and not to slow the user down waiting for the Day form to open. Iteration 31 of 9304, iteration 15 of 9304A and iteration 5 of 9304B.
introduced in 9304C	-	**39494 - R8 -** The Last resort idle code workshop loading parameter now works with the new klock device. When you have set the workshop loading parameter a new option will be displayed in the klock on the Job type screen. This is displayed at the top of the Job type screen with the description of the idle code that has been used and in purple. The Last resort idle code functionality has not changed and works as normal.
Point of Sale	Courtesy Car Icon	**30239 - R8 -** For Body shops only. The Courtesy car loan duration (Date due) is calculated by the number of hours on the WIP and then divided by the number of hours in the day; the default number of hours for one day is 5hrs. E.g. 10hrs on the WIP will set the Date due for 2 days. The calculation also rounds up, so if this is not a complete day, e.g. 3.5 days then it will be rounded up to become 4 Days booked. The Date due loan duration is system generated and can still be overwritten by the operator.

Point of Sale	Point of Sale WL Launch Control Icon/Jobs button	**30244 - R8 -** The fields Phase and Owner on the Jobs form now use the description name and not the code.
-	-	**31458 - R8 -** We have added the WIP number and line number to the Wizard form in workshop loading to aid in the loading of work. The main benefit to this is when the user selects the WIP column header to assign all the Unassigned tasks in the Day form, is that we now know the WIP number and line numbers that we are assigning.
introduced in 9304C	-	**35521 - R8 -** Two new fields have been added to the Resource file called 'Klocking screens to use', the new fields are used by the new clocking device so that you can filter your technicians on to more than one clock screen or to filter them out completely. 1. To see all technicians leave the two fields blank. 2. To filter between two screens enter the terminal names or numbers that you have used in the Configuration files on the klock and add them to the klocking screens to use fields. The iteration numbers for the release notes for the QA 80568 above are 9304 - 46, 9304B - 22 and 9304C - 09.
introduced in 9304C	-	**37979 - R8 -** You can now add a two character company letter in to the Company field on the " Soap connection " page in the configuration file, this will allow dealers that already use company letters to use them in the klock too. The iteration numbers for the release notes for the QA 84784 above are 9304 - 47, 9304B - 26 and 9304C - 09.

Main Menu

Menu option	Form/Tab	Description
-	Jobs Form	**1208 - E8 -** We have added a new check box to the Jobs form in workshop loading called ' Future '. When checked it will display all the jobs that have been booked in after today, it will allow the user to go and check the work coming in and print jobcards. *To help identify future booked repair jobs, a new check box has been added to the Job from within Workshop Loading. By selecting this check box it will reduce the display to future jobs making it easier to establish that the work is due to come in and print off the job cards as required.

Point-of-Sale	-	**1247 - E8 -** This enhancement was specifically for Spain and allows a global environment variable to be set that will set the default clock off status for all companies to be set to either A for authorisation,L for labour or P for parts. This then will encourage users to make job completed using a mouse click event rather than accepting what's been offered without looking.
-	"	**1248 - E8 -** We have added new filters to the Jobs form of workshop loading , in the status group the status colours are now buttons which when selected allow you to filter on the WIP statuses in the jobs form which will make controlling the WIPs much easier especially with large workshops. *For larger workshops in particular, we have added the facility to filter jobs by status on the Jobs form in Workshop loading. By clicking one of the colour coded buttons this will immediately reduce the jobs displayed to those with that status, for example, Stopped or Waiting.
-	Touch Screen	**1249 - E8 -** We have made the Touch screen permanently the full screen size to allow for the maximum amount of technicians to be displayed on one screen , this will allow 35 technicians to be displayed where possible. ▪ 800 / 600 screen will display 20 technicians ▪ 1024 / 768 screen will display 35 technicians We have also added the abilty to select an Idle code from the list rather than using the up and down buttons. *There now is the facility to Maximise the Touch screen allowing more technicians to be displayed on one screen. This will allow 35 technicians to be displayed instead of 20. In addition, there is also the facility to select an Idle code from the list rather than using the up and down buttons.
-	-	**1252 - E8 -** This clocking suspend report is for use with POS software clocking window and touchscreen clock window. The K20 Timed Ops Suspend report will suspend Technicians from their current job at a specific time when batched to run in timed ops as a once only or daily event. This can also be batched again to resume Technicians at given time as a once only or daily event. This makes it possible to clock off all techs that have forgotten to clock off and them resume them to clock on. Great care is needed using this report as some technicians maybe have valid overtime reasons for working late or maybe off sick the following day and clocking could be resumed when they are not available for work. A further enhancement has been added via a tick box on report, which suspends clock off to the end of that technicians shift if they are still clocked on when report is executed. So report must be batched after last technician has gone home or batch report to run at least 30 mins after the last overtime clocking. This means any overtime being done must be manually clocked off on clock window before technician goes home. This will ensure when report is run that

		only those technicians that have not clocked off will be assumed to have forgotten and this will set clock off time to end of shift.
Resource Availability	-	**1254 - E8 -** We have added the ability to record more than one adjusted availability reason in the Resource availability option in workshop loading. If more than one reason exists this will be marked in the resource availability grid as ' Yellow ' with a asterisk and a hover prompt of ' More ' against the reason. *There is now the facility to record more than one adjusted availability reason in Workshop Loading Resource Availability. If more than one reason exists this will highlighted in the resource availability grid with a Yellow background with a asterisk. There will also be a hover prompt of 'More' against the reason.

System Maintenance Menu

"	WLCKARC Archive Clock Entries	**1251 - E8 -** This is a new program that is set to run in timed ops that will remove clockings from the clock file and put them into a new clocking archive file. This is partly controlled by the SO consolidate wips program because this program deletes the wipnos header records amongst other routines. The new WL Archive clock program will then check for wipno header's no longer existing archive clockings records when program run periodically in timed ops. To keep the amount of clockings archived down to a manageable size a new parameter in WL system parameters was created to delete idle clockings after a certain amount of days old. This will ensure only archived records for wipnos will remain after that retention is reached.
System Parameters	Adjust Clockings	**1255 - E8 -** This enhancement will add further checks to clocking record editing and prevent low priority users from editing technicians clock times. This will also check the clocking record is a valid labour line against LABNOCOS parameter on SO wpars parameters.
"	-	**20188 - E8 -** "We have added a new workshop loading system parameter called Active future planning. When the parameter is ticked workshop loading will operate as normal when loading work in, un-ticked all the loading side of workshop loading will be suppressed."

Bodyshop Management

Menu option	Form/Tab	Description

-	Vehicle Tab	**1380 - E8 -** We have added two new fields to the Point of sale form on the Vehicle tab called ' Write off ' and ' Salvage ' which are only available when you are set up as a Body shop terminal , this will also change the Workshop tab to the Bodyshop tab. The write off flag when checked will allow the user to enter a write off value against the vehicle and create a Write off contact to alert the sale dept of a potential sales opportunity. The write off value will be updated against the MK Vehic record on the Finance option. We have also added Write off contact defaults to the BE system parameters, these will need to be enabled to create a write off contact. *To support the additional Bodyshop functionality added to the 9304 release, we have added two new fields to the Vehicle tab called 'Write Off' and 'Salvage' which are visible when the terminal settings include a Bodyshop department . The Write Off flag, when checked, will allow the user to enter a write off value against the vehicle and will automatically create a contact to alert the vehicle sales department of a potential sales opportunity.
-	-	**1382 - E8 -** We have added labour progress colour codes to labour lines within Point of sale that are currently being used in Workshop loading, when a labour line is loaded to the WP it will be given a colour code according to its progress. The Parts Legend in Point of sale has been amended to display the Labour status progress colour codes which relate to the labour lines. *To increase the integration between Point of Sale and Workshop Loading the colour schemes used to indicate progress status on the Workshop Loading Jobs form are used as a background colour on the line number in the WIP grid. This means a Point of Sale user can quickly ascertain the status of labour line within a WIP by its background colour. To assist this the legend has been updated to explain the colour coding.
-	-	**1384 - E8 -** We have added a direct link to demonstrator bookings from point of sale and bodyshop via tool bar options and icons. When the WIP header for courtesy car check box is selected and a customer and vehicle demonstrator on the WIP , as soon as you take the load option you will be offered the demonstrator bookings form to allocate the loan car, once the load car date has been selected you will be taken in to WL on your selected date. We have also made it possible to enter point of sale directly from bodyshop estimating module but only in display mode.

<table>
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<td>1385 - E8 - We have added a new field to the Jobs form in Workshop loading called ' Phase ' . This field is to be used for Bodyshops and is populated with the skill group of the operation being worked on, for this to work correctly in workshop loading the skills must be sequenced in the skills option on the Workshop loading menu. If all operations are complete except for the final refit the skill group will be followed by an asterisk in the phase field to indicate that you are near completion of the job. We have added a new field to Department codes called ' Department Type. This can be validated from 0 to 6 : 0 = No Definition

1 = Workshop
2 = Parts
3 = Bodyshop
4 = Wholesale
5 = Fastfit
6 = Commercial

The department types can now be identified with a number , this will aid code writing in the future and will eliminate translation problems.

*To support the additional Bodyshop functionality added to the 9304 release, these is a new field, Phase, added to the Workshop Loading Jobs form. This is based on the sequence order within the Skills setup, with the maximum Skill is displayed in the Phase field. On the basis that a Bodyshop repair is completed in fairly rigid phases, Strip, Preparation, Repair, Paint, etc. the stage of the repair can be easily identified in the Jobs form from the Phase field contents.</td>
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Environment

Advanced Analysis

Menu option	Form/Tab	Description
-	-	**1503 - E8 -** There are 2 new fields in Advanced Analysis, add/modify topics: Authentication module and Authentication priority. These will be used on selecting a topic (and profile, dataset etc) to build a list of valid companies in the Advanced Analysis module. Only the companies for which the user has access will be included in the view.

Document Archive

-	-	**1445 - E8 -** When searching for a document in document archive you can now type in the number without having to type in all the leading zeroes as it now automatically adds these in.

Global Module

-	-	**1302 - E8 -** The user ID is now displayed on the title bar so that you can see, at a glance, who is currently logged in to a terminal. ENV("SCREENTITLE") must be set. This can either be set to "NAME", in which case the userid and partition number are shown, or "MODULE" in which case the module and company are shown additionally.
-	-	**1884 - E8 -** There is now a check on the termtype variable, so that if the user's terminal is not a PC, it will not show the KCBT options on the utilities menu. This is because a non-PC terminal will not be able to have the KCBTplayer installed and therefore will not be able to use KCBT.

Report Generator

-	-	**1308 - E8 -** The spool queue description column now gives the name of the report printed, regardless of where in the system it is printed from eg if printed from report generator would now show the correct title instead of 'run report generator'.
Introduced in 9304C	-	**41419 - R8 -** RG_SLEEPTIME = up to a maximum of 255. To work out what you want to set this to there are 20 milliseconds to each sleeptime. So if sleeptime is 50 then this is 1000 milliseconds (= 1 sec). Some reports can loop round through the records over millions of times, so this rg_sleeptime and rg_sleepcount should be used with great care, for a typical setup we would suggest that rg_sleepcount = 20,000 this means every 20,000 records it will go for a sleep to allow processor some time for other users to have a portion of CPU time. Time to pause can be upto a maximum of 5 seconds which is = (rg_sleeptime=250) but should be set to 50 (1 second sleep). Increase this in blocks of 50 if server is still too slow. If less than 20,000 records were scanned before rep gen completed it wouldn't go through the pause code and runs as normal. The default settings in UserEnv.txt could look something like this below. B"RG_SLEEPCOUNT","20000" B"RG_SLEEPTIME","50"

System Utilities

-	-	**1415 - E8 -** Improvements have been made to the Management Menu/Permissions and Securities form. These include various shortcuts, and the design and appearance have been changed to be more user friendly.
SU system controls	Timed Operations tab	**1446 - E8 -** Currently if any end of week, end of month or end of year chains are setup to run after midnight, they run a day too early because after midnight the date has rolled over to the next day. A new parameter has been added called 'Virtual Midnight' in the Timed Operations tab of SU system controls. It defaults to midnight (24.00) but will allow you to change the time to anything between midnight and 09.00am. Anything up to this time will still be treated as the previous day.
System Maintenance/Management Menu	Kprint Version Numbers	**1913 - E8** Further to E8/819 which introduced a new sub-routine to get the kprint template version numbers, this introduces another sub-routine to get the form version numbers, which necessitates a new column in the setup grid. This column is called Form version number.

Utilities Button

Tab Menu	KCBT	**1344 - E8 -** New menu option accessible in each module called KCBT (Kerridge Computer Based Training). The introduction of KCBT (Kerridge 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.

Customer Contact Management

Menu option	Form/Tab	Description

-	-	**1398 - E8 -** Creating Dictionary and script folders should be restricted to ADP login users. *It is now not possible for user below kcc priority (level 9) to create new folders from within dictionary and scripts maintenance. Standard data is utilised to ensure standard folder names are maintained. This will improve the efficiency in call script creation and amendment.
-	-	**1430 - E8 -** Call WIP Wizard from the assigned buttons in the script. *It is now possible to utilise the new WIP creation wizard routine with contact management call scripts. A button can be embedded within the form or one of the standard buttons at the foot of the form can be utilised, subject to having the necessary customer and vehicle information loaded. On completion of the WIP wizard routine the operator is returned to the same point at which they departed from the script. This improves the quality of call scripts that can be used for aftersales job creation.

Customer Relationship Management

Menu option	Form/Tab	Description
-	-	**483 - CRM -** We have given users the ability to amend contact notes after a contact has been saved. This is controlled by a system parameter. *A new CRM user controlled feature has been added to allow certain users to amend the contact notes on existing contact records. This facility is switched on/off in CRM user access control. In situations where users are responsible and are trusted not to alter the facts, after the event, then this can be helpful in perfecting contact information at a later stage

-	-	**735 - E8 -** Add registration number of proposed trade-in to qualification. The ability to input a registration number in to the trade-in TAB of the customer Extra details area, and using that automatically back-fill this data from the appropriate customer vehicle record has been added. See also Showroom issue 1485. This provides a labour saving device and improved efficiency/accuracy where details of the proposed trade-in are already stored within the customer vehicle file.
-	-	**1082 - E8 -** The user priority code should be specified on the service history codes file (SO.codes) and then the service history display within marketing should comply with this priority.
-	-	**1084 - E8 -** Due to multiple/composite names FIRSTNAM, SURNAME and OSURNAME as well as the final receiving field NAME have been resized in both MK and other modules using it (SL, PL, SR, VS, SO, ...) The following MK.targt fields have been extended to: • FIRSTNAME C50 • SURNAME C50 • OSURNAME C50 (This enhanchment is for KCCenhancementis in the core product.)
-	-	**1168 - E8 -** *A new customer spend analysis has been added to the CRM system. This provides a transaction listing and graphical display of all customer invoicing from either POS or VSB, and unlike sales analysis, is not limited to two years duration. Both sales and margin analysis is provided (margins being subject to priority). This spend analysis is much better suited to retail customers, where transactions are less frequent (once or twice a year for example) compared to the existing sales analysis, which is limited to two years worth of monthly statistics.
-	-	**1198 - E8 -** There is a new system parameter to control if the word search results for companies should be broken down into parent companies, branches and unrelated company (others) records.
-	-	**1226 - E8 -** Descriptions changed: 'number of gears' or 'gears' to 'Transmission type' or 'Transmission'.

Campaigns	-	**1290 - E8 -** The company fields have been made available to use on Marketing campaign formats and customer letter templates. We have also updated the look and feel of the campaign forms and the letter forms. *When writing letters from within CRM using the rich text formatting tool (rtf) it is now possible to include fields from the company record attached to the selected customer. This significantly improves the quality and functionality of corporate customer mailing. The company fields have been made available to use on Marketing campaign formats and customer letter templates. We have also updated the look and feel of the campaign forms and the letter forms.
-	-	**1314 - E8 -** This enhancement provides ellipses searches in date fields within CRM desktop.
-	-	**1316 - E8 -** Make sure the generic model code populates on the CRM vehicle record as the VS record is being created.
-	-	**1369 - E8 -** Data base auditing can now track changes made to CRM records while in the CRM record rather than just in the record maintenance grid. *CRM database change auditing has been introduced to the system allowing system managers to define which fields are to be monitored. Once this has been defined, for each of these fields the system stores the date and time of the change, the user that performed it and the old and new values for the data. This will allow system managers and CRM supervisors to monitor the quality of data entry allowing them to detect errors and identify users who are not supplying data correctly.
-	-	**1370 - E8 -** New or follow-up contacts within a defined period for statistics by recording the original contact. Also, the contact chain management (when creating new contacts in both CRM and Showroom based on this original contact) has improved with the ability to fork processes (One original contact may trigger more than one follow-up).
-	-	**1463 - E8 -** Demo bookings can be booked and completed within one process, whilst still allowing users to have the three stage booking (booking commencement and completion) or an alternative two stage booking (booking and completion).

-	-	**1466 - E8 -** The whole concept of stats has changed. Each user can have a unique view, statistics is flexible and information can be gathered from the Point of Sale module. Figures can be consolidated allowing information to be displayed quicker.
-	-	**1474 - E8 -** A vehicle record can be set to inform all users that the vehicle is stolen. This is hard coded and displays a warning message to the user before displaying the case file.
-	-	**1508 - E8 -** New field for total allowed weight to be added DD.varia, VS.newst/usdst and MK.vehic files. *New fields for total allowed weight on trucks have been added to the Franchise data variant record, the new and used vehicle stockbook records and the customer vehicle record. This improves the quality of information held against heavy commercial vehicles. (DD.varia, VS.newst/usdst and MK.vehic files).
-	-	**1717 - E8 -** <>After closing down open contact records that are no longer required in the case file routine the user can enter notes as to why this course of action has been taken. The notes are stored in a standard 'XXX' type follow-up mechanism.
Contact Codes	Contact Types	**17948 - E8 -** A new facility to launch into a open a WIP using Contact Methods 5 'open a wip' on the details2 form of the followup type code. (applied back to 9090_39 onwards)
My Desktop	-	**20406 - R8 -** Within the Main and Additional Tasks screens of the WIP creation wizard the 'Price (incl. VAT)' column has been added to show the price of the product including VAT. For clarity the existing Price column has been re-labelled to read 'Price (excl. VAT)'.
-	-	**24252 - R8 -** A new field has been added to MK.users called "OUTLOOK" which (overrides the flag in Administrator), if set to "Y" then the user gets Outlook in CRM. If it is set to "N" then it will act as usual **Note**: this requires MS office XP (otherwise known as MS office suite 10)

Vehicles

Franchise Data

Main Menu

Menu option	Form/Tab	Description
-	-	**449 - E8 -** Now that Road Fund Licence is driven by the CO2 Emission levels, we now can hold them in a lookup table. *A UK country specific enhancement has been introduced to calculate variable RFL/VED (road fund license/vehicle excise duty) within Showroom and VSB in line with the legislation introduced to the UK effective from the 1st of May 2003. This avoids users having to calculate the amount of license on an individual vehicle basis in both Showroom and/or VSB, or having to allocate specific options to individual variants in Franchise Data.
-	-	**717 - E8 -** New selection criteria to the copy options wizard to allow selection of 'ALL' options of type 'x' (and allow multiple types). *It is now possible to select all options of a specific type or multiple types to copy in one go. When copying options, you can now choose to copy prices and specifications from the source, based on a date. Option notes are now also copied from the source if required. This makes the specification copying process more efficient and avoids the unnecessary re-entry of existing data.
-	Build Spec	**1091 - E8 -** New priority to enable editing of Build Specification *There is a new system parameter within Franchise Data to determine the user priority required to utilise the Edit functionality within the Build Specification program. In addition to this, a further enhancement has been developed that whilst only one user can be in the Edit mode at any one time, other users can access the program in Display only mode. This will improve management control of this data whilst also allowing greater visibility to more users at any one time.

-	-	**1097 - E8 -** Introduce a flag in the franchise data option to decide whether to print option on SR documents -. any formats will need to be changed by support or a user. No standard ADP formats have been changed. *A new flag has been introduced to the option record that can be used within document formatting to decide whether or not to print that option on Showroom or Vehicle stockbook documents. This will allow users to suppress unnecessary data from customer invoices.
-	-	**1694 - E8 -** A revised CAP franchise data import has been introduced to handle new file structures from CAP. This allows direct data downloads from the SQL database on the CAP web site. An Update and Convert Wizard allowing individual manufacturers data to be converted was also a late introduction - (9304/13 and 9090/25).
-	-	**24029 - R8 -** As from 9304 iteration 15 Franchise Data includes a new level within Build Specification - Global level has been introduced it contains the same functionality as variant,model and franchise levels with the exception of supporting Colour, Trims & FFO's.

System Maintenance Menu

System Parameters	-	**1295 - E8 -** Parameterisation of factory fitted option types within franchise data.

Vehicle Admin and MK Vehic Menu

-	Adjust Clockings	**718 - E8 -** Add an indicator for left-hand-drive and right-hand-drive to DD.varia, MK.vehic and the VSstock files. *A new indicator has been added to the franchise data variant record, the new and used vehicle stockbook record and the CRM (customer) vehicle record, allowing the operator to specify whether the vehicle is left or right hand drive. This will provide improved vehicle information to both vehicle sales and aftersales processes.

Showroom

Main Menu

Menu option	Form/Tab	Description
-	-	**726 - E8 -** Now within Showroom when an option code is entered in the new and or used section of the Discount parameter (Accessory tab of SR.systm) the description of that option code is used to replace the previously hard coded description of Discount. *The Showroom purchase summary screen now uses a description of the discount element of the summary derived from the 'discount' option record rather than using a hard value defined within the standard form. This allows the presentation of the sensitive aspect of discount to be tuned for specific markets, franchises and even individual customers.
-	-	**739 - E8 -** Display SR enquiry number on final summary screen to enable user to note for future use without doing a search. *The profit area of the Showroom forms has been enhanced so that the previous 'blank' mode is now used to show generic details of the enquiry including enquiry number, quote number (where appropriate), order number (where appropriate), quote status, details of last user who accessed it, and on what date and at what time. This improves the information available to the showroom system operator.
-	-	**1093 - E8 -** Add secondary number controls for direct purchase used vehicle quotes and orders, in addition to the existing one used for normal sales of new and used vehicles. *Showroom will now use a separate purchase order number for used vehicle direct purchases (non trade-in) whereas it previously shared the same order number as used vehicle sales. This improves the document number control and management within the Showroom area.

-	-	**1356 - E8 -** Facility to allocate a new vehicle registration number at the time that the order is confirmed. *There is now a facility to allocate the new vehicle registration number at the time that the Showroom order is confirmed. This matches and tracks the manual processes currently used within new vehicle showrooms more accurately.
-	-	**1485 - E8 -** Add registration number of proposed trade-in to qualification. *It is now possible to specify a registration number in the Trade-in TAB within Customer Extra details in CRM and retrieve any details that are already known from an existing vehicle record where it is available. This provides a labour saving device and improved efficiency/accuracy where details of the proposed trade-in are already stored within the customer vehicle file. Also, when the vehicle sales invoice is produced in Vehicle administration, the related CRM customer Extra details (vehicle required and trade-in) will be cleared where appropriate, as no longer applicable. This again improves efficiency and accuracy, avoiding sales people having to clear this information down manually, or responding to out of date information. See also 735
-	-	**1497 - E8 -** Provide the ability to link deposits taken without printing a document. *The facility to link vehicle deposits taken within the Showroom process to a specific enquiry is now available at any stage, without having to utilise the print order routine to do this. This improves the flexibility of when and how deposits can be linked to specific showroom enquiries.

-	-	**1499 - E8 -** Introduce a new cost to change method of discounting in the Showroom Purchase summary screen. *A fourth level of discounting has been introduced in the Showroom Purchase summary screen, based around the 'Cost to change' principal, taking the trade in vehicle values into account and allowing the user to specify the end 'net' value. This improves how the system matches and tracks the manual vehicle sales business process operates in many dealerships, where the cost to change is the driving factor.
-	-	**1505 - E8 -** Extract Experian XML into ADP database. *Experian (vehicle provenance checking) raw XML data is now extracted in to ADP database file so that it can be analysed and reported on subsequently. This is UK country specific only at the moment and is an optional feature within Showroom and VSB. This greatly improves the benefit that this data provides.
-	Trade-in Form	**1506 - E8 -** Where available, allow the user to utilise the CAP or Glass's Guide coding to determine the franchise-model-variant code and other data, via another button the Basic details form. *An alternative franchise-model-variant code look-up is now available on trade-in vehicles within Showroom enquiries using the valuation systems logic, where available, as opposed to the standard ADP franchise data routines. This is currently a UK country specific function and is currently available for both CAP and Glass's Guide. This avoids the operators in showroom having to enter vehicle analysis in two different ways where the CAP or Glass's Guide coding is available.
-	-	**28441 - R8 -** When user changes a confirmed order and leaves the previous order open they can have two quotes with status "O" on the same vehicle but neither of them can be used again. To stop this happening when we take a confirmed order and change it we no longer prompt "this will leave the previous order open, Are your sure ?" the old Confirmed order is taken straight to X status and a new enquiry is opened. (MKV & VSB mode 9304 Iteration 32 onwards).

System Maintenance Menu

System Parameters	-	**774 - CRM -** New parameter to allow forced entry of appraisal information when a value is added to a trade in. *A new Showroom system parameter (Y/N value) has been added to control whether trade-in details can be saved as part of an enquiry with a value but without the appraisal details (UserID and date) being filled in. In this way sales management can control whether trade-in vehicle details on the system are backed up by the necessary expert information.
"	-	**1509 - E8 -** This enhancement provides a new system parameter that allows users with the correct priority to record lost sales. The option to cancel VSB acceptance depending on the users ability was tested on Issue number R8/18676. *Two new system parameters have been introduced in Showroom to control the user priorities required to use the options to 1. Record a Lost sale and 2. Cancel a previously Accepted order. This enhances the management control that can be exercised over this functionality.
"	-	**18676 - E8 -** This enhancement allows a parameter to be set so that users have the ability to cancel accepted orders with priority.

Vehicle Stockbooks

Main Menu

Menu option	Form/Tab	Description

Vehicle Administration	-	**711 - E8 -** Updated the message which asks you if you want to override the code on the spec lines when an account in the sales brief tab that has a different VAT code from the vehicle - set the focus on NO. *The option to override the VAT code on all vehicle spec lines based on the code derived from the customer (SL) account now defaults to 'No override' (previously defaulted to 'Override') and provides a clearer message regarding the implications of doing this. This should avoid accidental invoicing of incorrect VAT amounts on vehicle invoices.
-	-	**719 - E8 -** Location field has been added to the accept vehicle orders form.
-	-	**725 - E8 -** This enhancement allows users in Vehicle Stock books the ability to pre-select a department when pushing lines to Point of Sale, allowing Point of sale user's to display wips to be created by department. *Pushing vehicle preparation from VSB to POS now allows entry of the appropriate department within the POS branch selected ('W'orkshop or 'B'odyshop for example). The notes box has also been extended to display the 4 lines x 30 characters of notes more effectively. This improves the direction of vehicle preparation requests to separate departments within larger and more defined aftersales operations.
-	-	**734 - E8 -** This enhancement allows users in Vehicle Stock books the ability to pre-select a department when pushing lines to Point of Sale, allowing Point of sale user's to display wip's to be created by department. *Amending the registration number and/or first registered date in Vehicle stockbook after the vehicle invoice has been produced will now automatically update the vehicle record in CRM. This improves the efficiency and accuracy of this important data when it cannot be ascertained prior to vehicle invoicing.

-	-	**1227 - E8 -** Option to search in VSB on specification tab. *A facility to search for options while amending the specification of a vehicle within VSB has been introduced, in the same way that already existed in Franchise data, Build specifications. This uses a text match search on a contains basis using the option description. This is available for both recoverable and non-recoverable specification items. This will make the process of picking specific vehicle options much easier where large specifications exist.
-	New and Used Identity Tab	**1317 - E8 -** New field added to the new and used identity tab within vehicle stock-books. The field is a 10 character field. The field when completed will populate the Immobiliser field in CRM. *The immobiliser code has been added to the vehicle stock records (it was already held on the CRM vehicle record) so it can be maintained from vehicle administration. This improves the quality of information that is held within vehicle administration and also the continuity of this information throughout the life of the vehicle.
-	-	**1347 - E8 -** The option to view Product Notes after the vehicle has been invoiced has now been made available, the form is available in display mode only. *Product notes can now be viewed in display mode even if the vehicle spec line has already been invoiced. Previously it was not possible to view these once the line had been invoiced. This improves access to useful vehicle information on an ongoing basis.
-	-	**1498 - E8 -** This enhancement allows the account and progress status to display on the finance details screen of any trade-in vehicles. *The trade-in vehicle accounts status and progress codes are now shown alongside the trade-in details on the sold vehicle, Finance details form, thus improving the quality of information stored against sold vehicles, and avoiding having to drill in to the trade-in record to ascertain this information.

-	-	**35861 - R8 -** Added the previous registration number to the word search index for usdst.

System Maintenance Menu

System Parameters	-	**636 - E8 -** Allow parameter to remove compensation on P/EX purchases.