

## Release Notes Client Version 3.6.3

**Overview:** Version 3.6.3 sees the introduction of the server migration feature, the migration procedure for sites accessing their database remotely is covered in another document in the version release section of our support pages. Sites that are using our Microbasedb server need to read this document as our **current server will cease operating as of October 31<sup>st</sup>, 2018**. We are confident our new server Microbasecloud will provide our users with a much-improved user experience in relation to speed and up time hence the reason for the migration.

This version also introduces improvements to the way we create client statements, these can now be run on a date range or allocation basis exactly the same as the AR aging report. Finally, 3.6.3 contains a Repco specific enhancement to the method used to select recipients of the campaigner newsletter.

The new feature is aimed to assist new locations that have had a client listing imported that contains email addresses, currently those clients will not be contacted as they have no transaction history in the last 2 years. 3.6.3 introduces a method to flag clients to receive the newsletter manually or globally allowing new RAS members to take full advantage of the newsletter distribution.

## Statements

Accessing Activities / Create Statements will allow you to select the format of your statement – date range which simply looks at the date an invoice was created and the date of any payments made these are applied to most outstanding invoices to create an aging by current / 30 / 60 / 90+ days. The second method allows you to produce statements on an allocation basis, this method calculates aging based on the actual payment allocation to a specific invoice.

On the create statement form you will see an aging formula option over on the bottom right hand corner of the display. To select the method required, click on the arrow to the right of the field and select either allocation or date range.

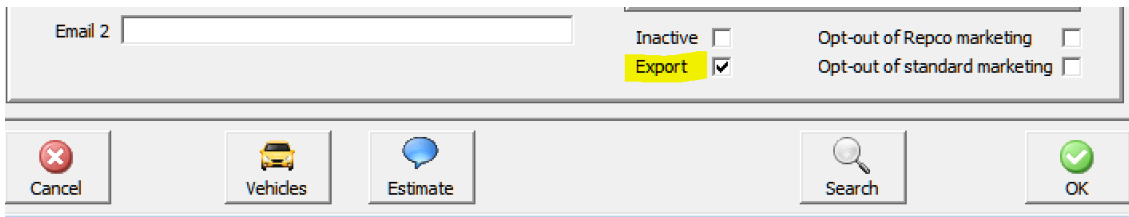
## Repco Campaigner Recipients

Please note the following instructions apply to Repco locations only.

To select a list of clients with email addresses go to Activities / Clients To Export, click on the option, you will see all clients with email addresses in your database. To select individuals that you wish to send a newsletter to simply select the checkbox at the end of the line.

Client/Company	Email	
Aaa Paint And Panel	accounts@lawrie.com.au	<input checked="" type="checkbox"/>
Abms Pty Ltd / Jon Krecu	Abms@abms.com.au	<input checked="" type="checkbox"/>
Accru Harris Orchard	smoore@accruadel.com.au	<input checked="" type="checkbox"/>
Acmt	lisa@acmt.net.au	<input checked="" type="checkbox"/>
Adelaide Quality Plumbing	bradley@adelaidequalityplumbing.com.au	<input checked="" type="checkbox"/>
Adelaide Sailing Loft	john.hayter4@gmail.com	<input type="checkbox"/>
Adkins, Simon	simonadkins8@gmail.com	<input type="checkbox"/>
Afl Services	admin@aflservices.com.au	<input type="checkbox"/>
Afl Services	admin@aflservices.com.au	<input type="checkbox"/>
Afl Services	admin@aflservices.com.au	<input type="checkbox"/>
Agars	scott@agarsindustrial.com.au	<input type="checkbox"/>
Agars, Nigel	nigelagars@gmail.com	<input type="checkbox"/>
Ahrens, Simon	simon.ahrens@gdfsuezu.com	<input type="checkbox"/>
Ahrens	accounts@ahrens.com.au	<input type="checkbox"/>
Allen, Greg	gregallen@altfuels.com.au	<input type="checkbox"/>
Allen, Robert	rob.allen2020@gmail.com	<input type="checkbox"/>
Allianz	claims@warrantyadmin.com.au	<input type="checkbox"/>
Altamura, Michael	michael.altamura@epic.com.au	<input type="checkbox"/>

If you wish to select all, point and click the checkbox in the header marked in yellow on the example. To deselect point and click on the tick, these clients will no longer receive a newsletter.



The screenshot shows a client management interface. At the top, there is a text input field labeled 'Email 2'. To its right are four checkboxes: 'Inactive' (unchecked), 'Export' (checked and highlighted in yellow), 'Opt-out of Repco marketing' (unchecked), and 'Opt-out of standard marketing' (unchecked). Below this section is a horizontal bar containing five buttons: 'Cancel' (with a red 'X' icon), 'Vehicles' (with a yellow car icon), 'Estimate' (with a blue speech bubble icon), 'Search' (with a magnifying glass icon), and 'OK' (with a green checkmark icon).

You can check the status of an individual client via the client form, if the export option is selected a newsletter will be sent to the client, you can also edit a client from this form by pointing and clicking on the option to select / deselect.

As we stated earlier this feature is aimed at assisting new RAS locations, sites that have transaction history will already have clients flagged to receive the communication unless the Opt-out of Repco marketing option has been selected. Note also if your database is stored locally that you must be **running server 3.4.0** or later for your selected records to be exported.