Version 3.6.4 Client Release Notes

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NOTE: Please read the changes made to the in-program security with regards to accessing both Purchasing and Receipts.

Overview

Version 3.6.4 represents an exciting new release of Automation Premium Client. This version introduces MyAutoConnect and local roadside assistance issuing functionality plus a host of additions that we are sure will assist you in the day to day operation of your business. 3.6.4 is the first release of a two-part update, the second code set with even more enhancements is due for distribution in March 2019. Please ensure you read these notes fully to ensure you get a real handle on how the new features will assist you in getting better results from using Automation Premium.

MyAutoConnect

Introduction: MyAutoConnect allows you to connect with your client directly via smart devices, your main terminal and online job card. The MyAutoConnect system allows for the automation of many communications such as service reminders, registration renewal and roadside assistance expiry / renewal.

You have the added ability to send instant promotions, estimates and quotations directly to your client's smart device. MyAutoConnect has the option to include roadside assistance in the marketing mix with easy access allowing you to truly deliver on the peace of mind motoring promise.

Brand awareness is backed by point of sale brochures and an information web site www.myautoconnect.com.au

We have created an online instruction manual that gives you a total overview of the product from setup to operation to view these pages please go to https://www.myautoconnect.com.au/dealer/help further information for users considering using MyAutoConnect go to https://www.myautoconnect.com.au/dealer

MyAutoConnect can only be used by clients that host their data on our cloud server, so if you are looking at introducing this initiative to your client base and still store your data locally you will need to transfer via the local server transfer option. MyAutoConnect is designed to truly partner your clients into the servicing / repair process. Once installed we are confident that offering this feature to your clients you will be servicing their needs better and as such create more sales.

Roadside Assistance

Overview: Microbase have been offering Roadside Assistance to Automation users for over 20 years, during that period of time we have always offered only 6 months cover which in the past covered a vehicle for the standard servicing cycle. As you well know times have changed and repairers are now faced with much longer intervals between servicing so we to have adjusted to the market and are now offering extended periods of cover. Our users will as of January 2019 be able for offer their clients membership for a 6, 9- or 12-month period.

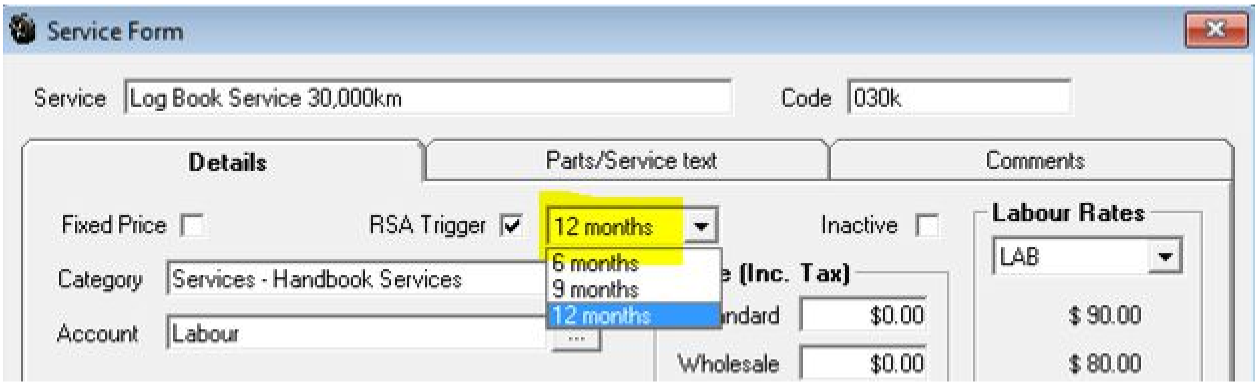
We have also negotiated a totally new arrangement with our service provider that extends the cover benefits. These include unlimited emergency callouts and an increase in the payout for lockouts to $77.00.

Microbase as of January 2019 will cease using surface mail to send client membership. Instead we will be delivering an issue at point of sale, via email or SMS and MyAutoConnect. Please read the following instructions on how these changes will affect roadside assistance issues as of January 1st.

Services, Setup: To be able to issue roadside assistance to your clients you must first contact Microbase requesting your records are queried for new issues. We will talk you through the local setup and log your requests on our CDM server to start issuing roadside assistance for your site further information on cover and costs can be accessed from https://www.myautoconnect.com.au/dealer/roadside-assistance and https://www.myautoconnect.com.au/rsa

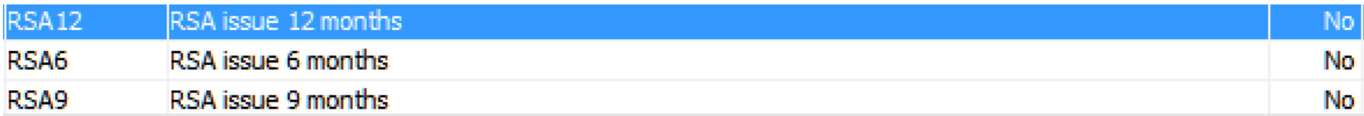
The new issuing method allows you to choose the length of cover by flagging a service or placing one of the roadside assistance issue services onto the job card.

Services, Editing For RSA Issue: Go to the top of screen select services, scroll or use the search field to locate the service you wish to edit for issuing roadside assistance. Point and double click on the service record to open the service form. You will see an option trigger RSA followed by a field with a drop-down menu containing the 6/9/12 month period selection, click on the button to the right of this field then point and double click on your selection, which will now populate the field.



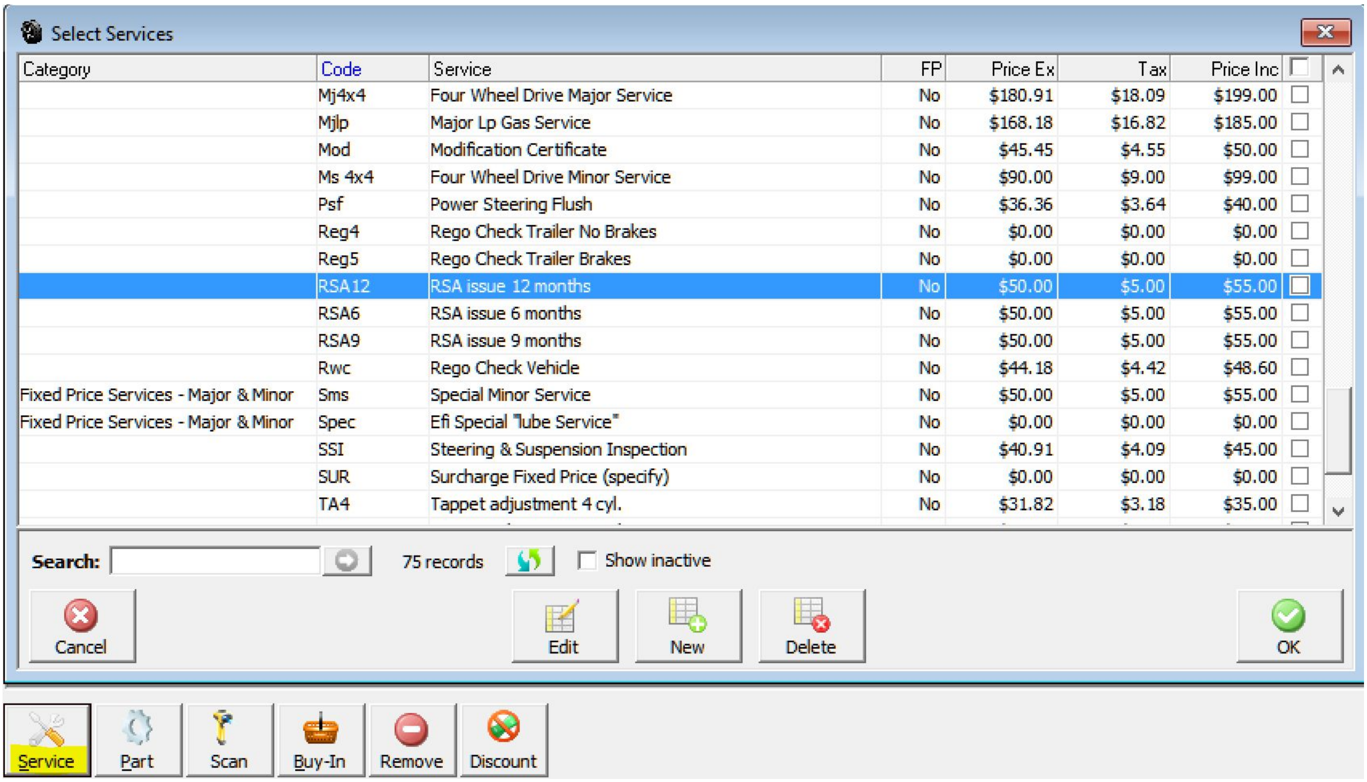
Above is the automatic method for setting up roadside assistance issue, each time you place a service that is set to issue roadside assistance (trigger set to true).

Manual RSA Issue: Automation has 3 x pre-set services in the service listing, adding any of these to the job card will initialise roadside assistance membership. These are setup to issue cover for the period you require.



RSA12	RSA issue 12 months	No
RSA6	RSA issue 6 months	No
RSA9	RSA issue 9 months	No

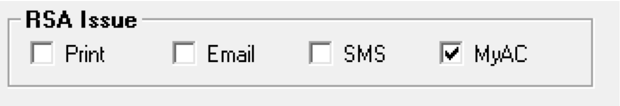
To Issue roadside assistance manually, from the job card select services, highlight the period you wish to cover by selecting one of the entries above, complete with OK (F12).



Category	Code	Service	FP	Price Ex	Tax	Price Inc
	Mj4x4	Four Wheel Drive Major Service	No	$180.91	$18.09	$199.00
	Mjlp	Major Lp Gas Service	No	$168.18	$16.82	$185.00
	Mod	Modification Certificate	No	$45.45	$4.55	$50.00
	Ms 4x4	Four Wheel Drive Minor Service	No	$90.00	$9.00	$99.00
	Psf	Power Steering Flush	No	$36.36	$3.64	$40.00
	Reg4	Rego Check Trailer No Brakes	No	$0.00	$0.00	$0.00
	Reg5	Rego Check Trailer Brakes	No	$0.00	$0.00	$0.00
	RSA12	RSA issue 12 months	No	$50.00	$5.00	$55.00
	RSA6	RSA issue 6 months	No	$50.00	$5.00	$55.00
	RSA9	RSA issue 9 months	No	$50.00	$5.00	$55.00
	Rwc	Rego Check Vehicle	No	$44.18	$4.42	$48.60
Fixed Price Services - Major & Minor	Sms	Special Minor Service	No	$50.00	$5.00	$55.00
Fixed Price Services - Major & Minor	Spec	Efi Special "lube Service"	No	$0.00	$0.00	$0.00
	SSI	Steering & Suspension Inspection	No	$40.91	$4.09	$45.00
	SUR	Surcharge Fixed Price (specify)	No	$0.00	$0.00	$0.00
	TA4	Tappet adjustment 4 cyl.	No	$31.82	$3.18	$35.00

Sites that were issuing roadside assistance prior for 6 months all services that were triggered to issue RSA will now be set by default to 6 months so if you wish to extend the cover for any of these you will need to edit cover from the service form. It is also suggested that if you were previously using a service with the code RSAISS1 or RSA1 that you open the service form and select inactive so you no longer see this entry in your service listing. In future simply use the new services we have provided to issue roadside assistance cover.

Job Close, Issuing RSA: There are now 4 issuing methods, print, SMS, email and MyAutoConnect as you close the job card you will see the choices displayed on the job update screen.



If your customer is already registered to receive communications via MyAutoConnect the MyAc option is flagged by default, you can choose to notify the client that he / she is now covered via any or all options. If you choose to print a membership form will be printed, this can be folded in three (like an A4 being inserted into a DL envelope) and handed to the client. Depending on whether you print in monochrome or colour this will of course determine the final appearance of the membership.

Roadside Assistance

Your key to nationwide peace of mind motoring.

Your Vehicle is now covered 7 days a week, 24 hours a day.

Commitment to quality service is the key.

Our automotive service centre is committed to providing you the best possible service. Service that extends past our front door and is available 7 days a week, 24 hours a day. With this cover, you have access to over 1,000 service units nationally.

For assistance, please call:

1800 062 222

Assistance Cover (full terms & conditions www.myautoconnect.com.au/rsa)

Restrictions: We tow for 20km after which the customer is liable for a charge on an excess kilometre basis. We provide one tow per breakdown, smash towing is NOT included.

Point Of Return: Return must be to the service centre listed below. However if the tow exceeds 20km. You can nominate to take the vehicle to the closest service centre. After hours towing requires your vehicle to be towed to the service centre and secured at the owners risk. Alternatively the vehicle can be towed to secure storage for delivery to the service centre ASAP. The customer is liable for the cost of the second tow.

Cover & Termination: Roadside assistance is only valid for the vehicle detailed below. It is however transferable to a new owner. We reserve the right to terminate the benefits of roadside assistance without notice at anytime with no right of claim whatsoever.

Access to unlimited emergency call-outs during your cover.

Call us when you need assistance:

- **Breakdown**; we will tow up to 20km.
- **Flat battery**; we can assist with a jump start.
- **Flat tyre**; we can fit your spare wheel.
- **Lockout**; gain entry and call a locksmith if required (to the value of $77.00).
- **No Fuel**; we can deliver 5L to get you moving again.

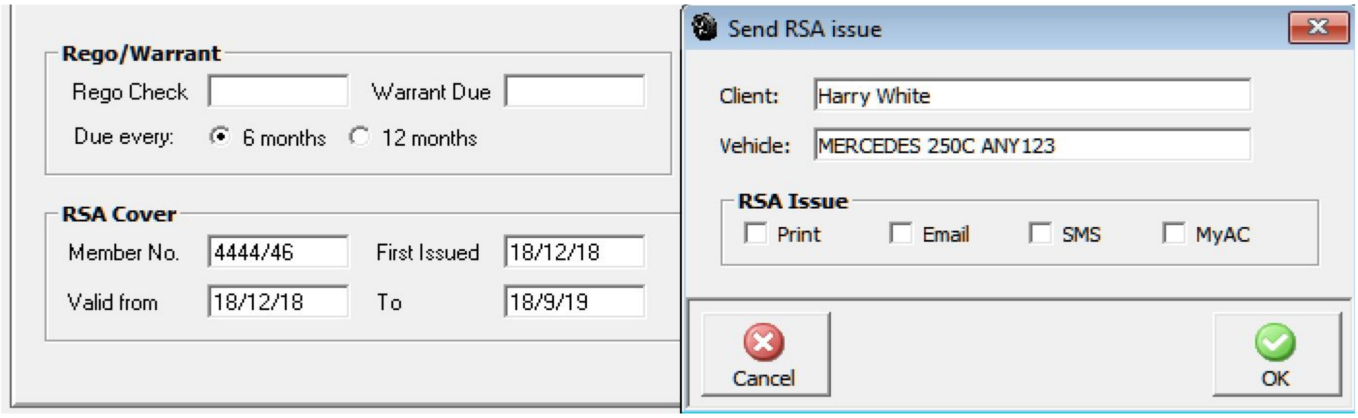
Preferred Customer Nationwide Roadside Assistance Cover

Customer: Mr Dave Beecroft	**Issuing Site Details** **Site Name:** AA Automotives
Vehicle Make/Model: MERCEDES 250C	**Address:** 1123 Kings Highway
Registration: VEH789 **Member #:** 4444/48	Fremantle WA 6959
Cover Valid From: 11/12/18 **to:** 11/6/19	**Phone #:** 08 9568 4587

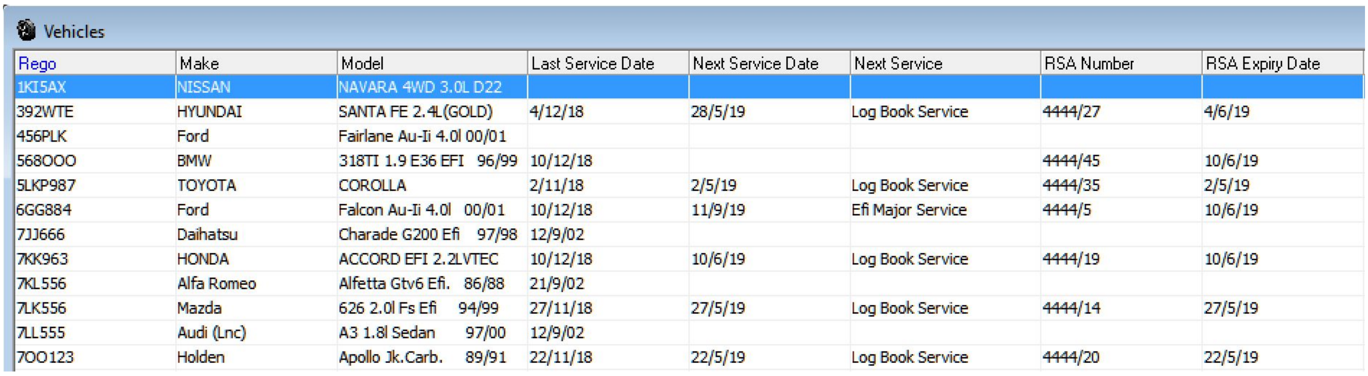
Allow 48 hours for cover to be validated. We suggest you keep this membership in the vehicle glovebox.

You can alternately email cover by selecting the email option, your client will receive a separate email titled RSA issue from <your site name>. The final method is SMS, your client will receive an SMS including membership details and a link to the terms and conditions of cover https://www.myautoconnect.com.au/rsa.

RSA Cover Viewing & Reprinting: RSA cover is recorded on the vehicle form and can viewed by selecting the servicing tab and the send / Print RSA Issue option, to notify your customer you can select a single or multiple methods.



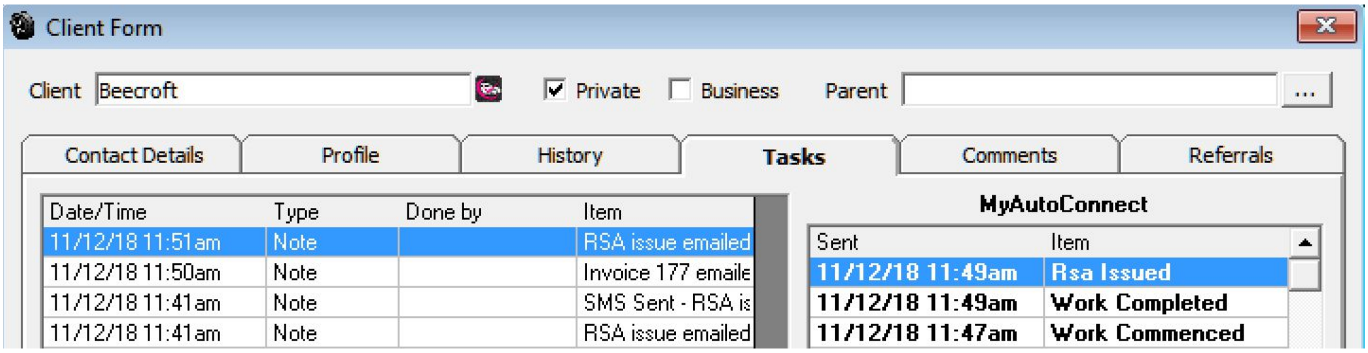
These details are also displayed in the vehicle listing



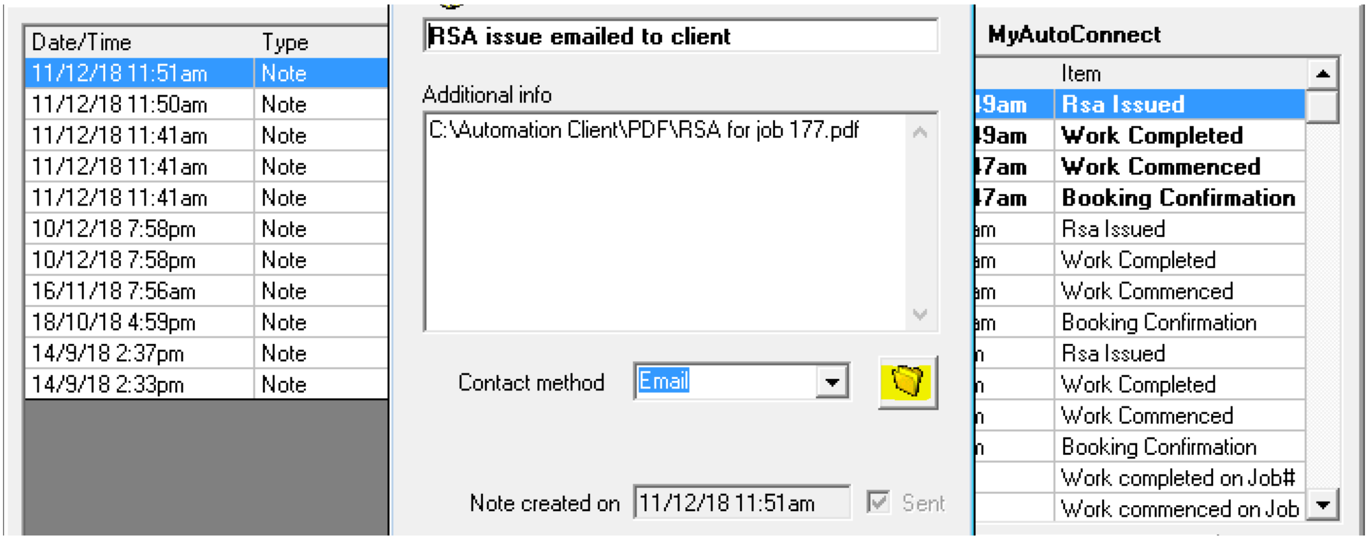
Vehicles

Rego	Make	Model	Last Service Date	Next Service Date	Next Service	RSA Number	RSA Expiry Date
1KI5AX	NISSAN	NAVARA 4WD 3.0L D22					
392WTE	HYUNDAI	SANTA FE 2.4L(GOLD)	4/12/18	28/5/19	Log Book Service	4444/27	4/6/19
456PLK	Ford	Fairlane Au-Ii 4.0l 00/01					
568OOO	BMW	318TI 1.9 E36 EFI 96/99	10/12/18			4444/45	10/6/19
5LKP987	TOYOTA	COROLLA	2/11/18	2/5/19	Log Book Service	4444/35	2/5/19
6GG884	Ford	Falcon Au-Ii 4.0l 00/01	10/12/18	11/9/19	Efi Major Service	4444/5	10/6/19
7JJ666	Daihatsu	Charade G200 Efi 97/98	12/9/02				
7KK963	HONDA	ACCORD EFI 2.2LVTEC	10/12/18	10/6/19	Log Book Service	4444/19	10/6/19
7KL556	Alfa Romeo	Alfetta Gtv6 Efi. 86/88	21/9/02				
7LK556	Mazda	626 2.0l Fs Efi 94/99	27/11/18	27/5/19	Log Book Service	4444/14	27/5/19
7LL555	Audi (Lnc)	A3 1.8l Sedan 97/00	12/9/02				
7OO123	Holden	Apollo Jk.Carb. 89/91	22/11/18	22/5/19	Log Book Service	4444/20	22/5/19

If you wish to reprint a RSA membership you will need to go to the client list point and double click on the record, select the tasks tab, you will see a list of the various communications send to the client. Point and double click on the RSA issue entry.



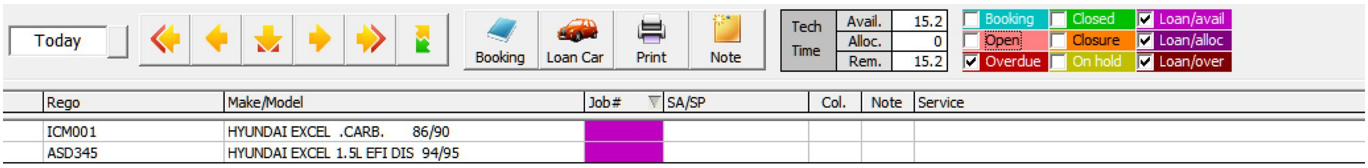
This action will open the note form, from there to view the membership you simply select the folder icon situated to the right of the contact method form. The file can be viewed from your PDF reader and printed or emailed from there.



Note: We replicate records to our service providers server every 24 hours, however please allow 48 hours for validation, this lead time ensures the record is recorded on Australia Wide Assists server.

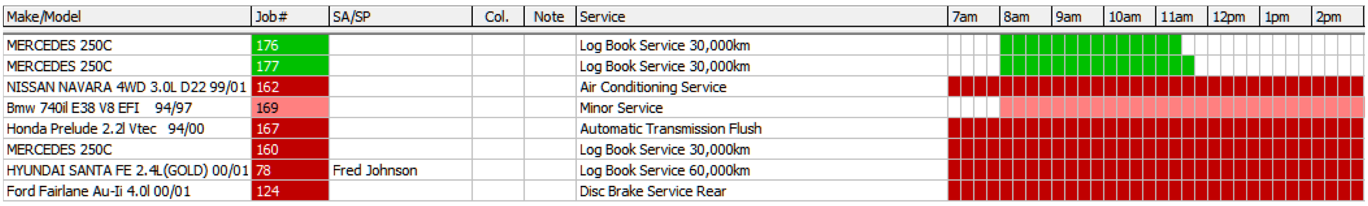
Diary Screen

Loan Cars: You can now see the status of all loan cars from the diary screen these fall into three categories, loan, allocated and overdue.

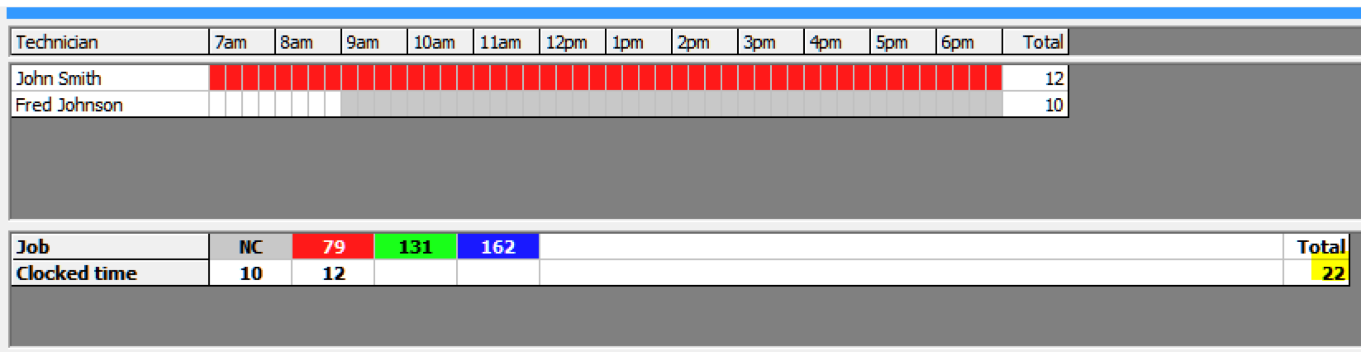


Status is colour coded in the body of the diary according the top legend.

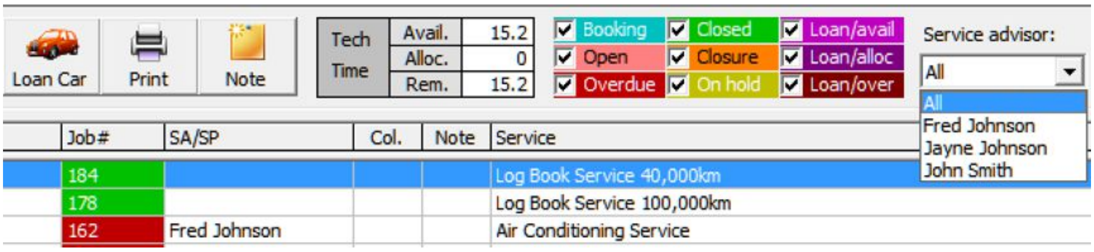
Job Status: The colour coding displayed on the timeline has now been extended to the job column.



Allocated Time Display: Version 3.6.4 now combines non chargeable time into the daily totals available from the technicians labour allocation view.

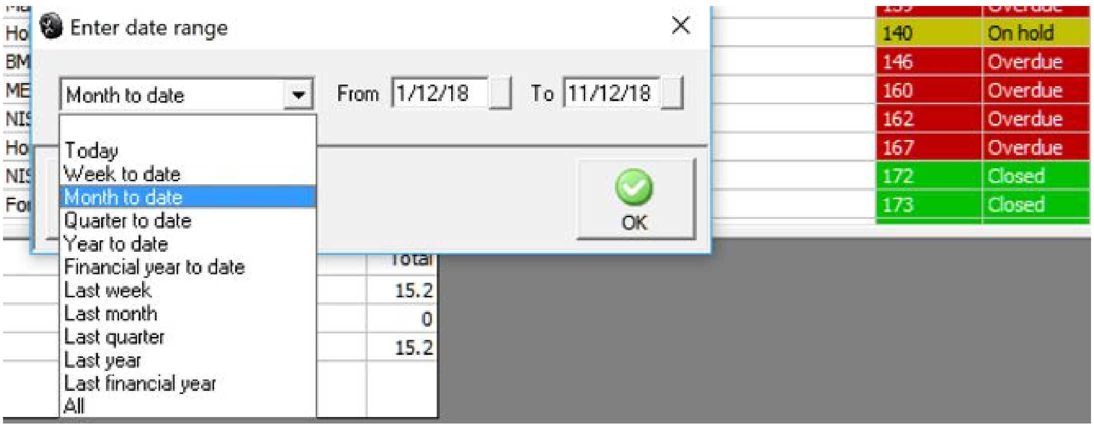


Service Adviser Filter: The diary screen now allows you to select a list of jobs allocated to a specific service adviser, click on the service adviser option button at the top of screen. Point and double click on the adviser name and only the jobs allocated to that adviser are displayed.



Reports

Date Selection: The selection has now been expanded to show all options

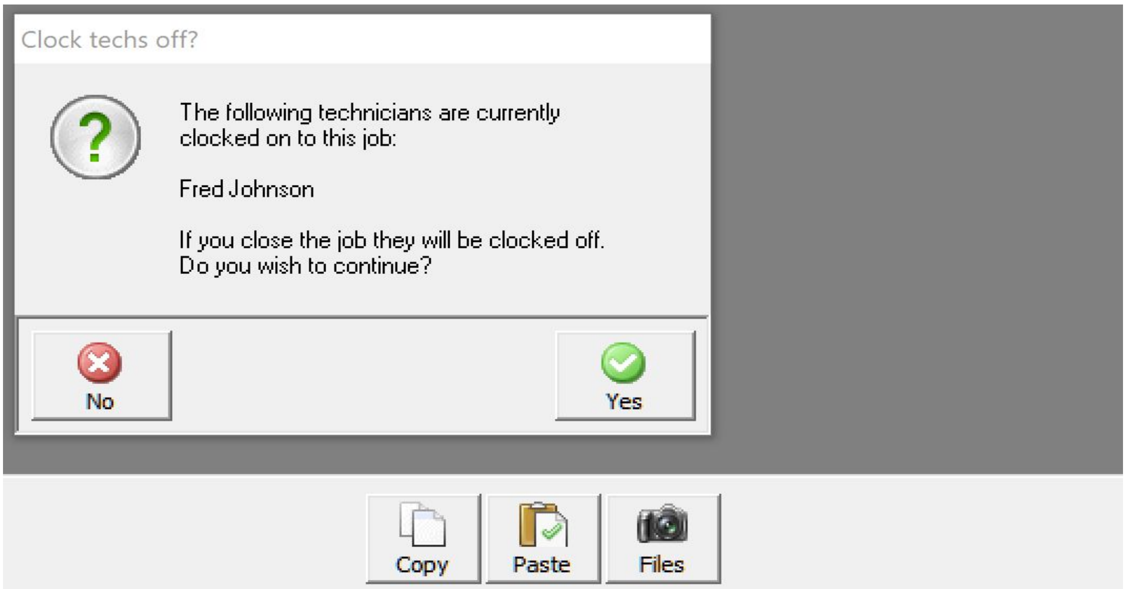


Service History: Report has been corrected to show service date kilometres not the current kilometre reading

Job Card

Address: If the physical address differs from the billing address Automation will print the physical address.

Closing, Logging Off Technicians: If a technician is logged onto a job when the close process is initiated you are warned and can log him off automatically during the close procedure.



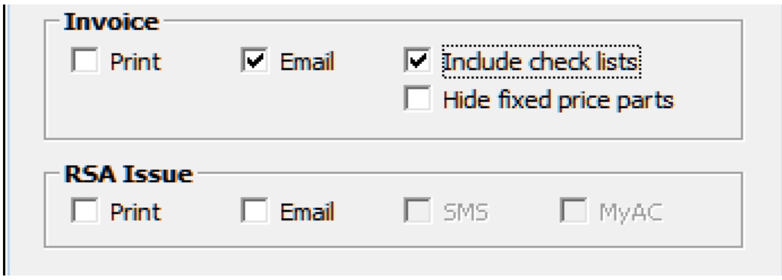
To log a technician off simply select the yes option from the display.

Closing Technician, Job Card: When a technician closes a job when logged onto Automation the name is retained in the top left-hand side of the job card.

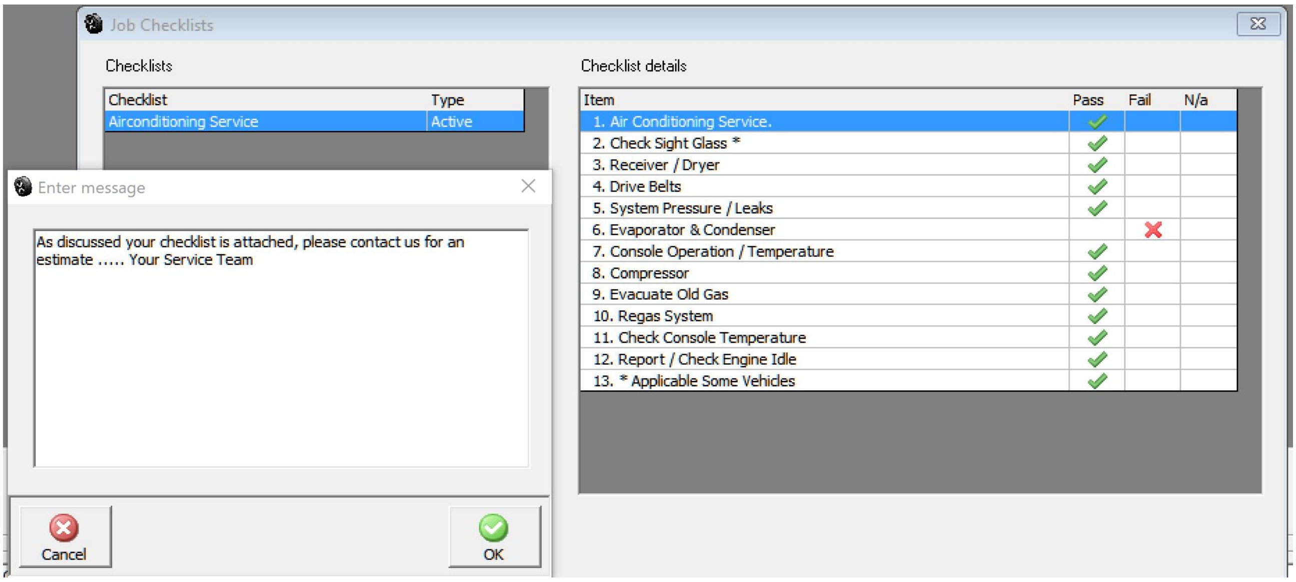
Emailing: We now display a prompt when selecting to email from the job card

Job Card, Printing: New selection from the print menu print 1st. Page only

Checklists: Can now be emailed with the invoice by selecting the option available from the job update form.



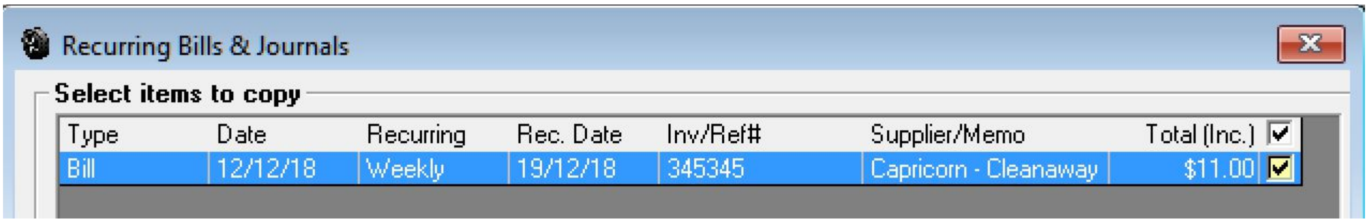
Checklists can also be emailed with a message to the customer at anytime during the repair / servicing process. To activate this option, select checklists from the bottom of the job card screen. Selecting the email button displays a note box, enter your message, finalise and your email is sent. Your message will be in the body of the email with checklists as a PDF attachment.



Purchasing

Reporting: In any report accessing stock levels required Automation will now take into consideration the allocated quantities as no longer available and will add these values to stock required.

Recurring Bills & Journals: Now has a select all option in the list, to activate simply select the checkbox located in the header.



Client Listing

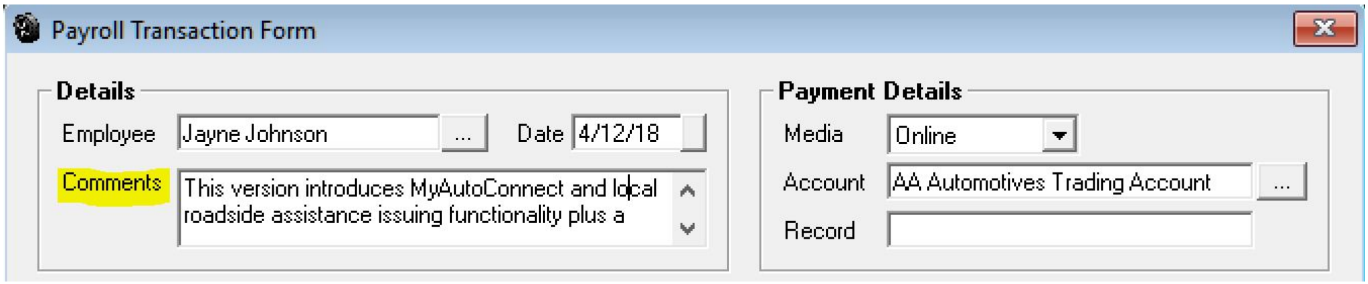
SMS: Version 3.6.4 introduces a SMS option available from the bottom of the list, to SMS a client simply highlight the record from the client list select SMS, choose your message or free type and send.

Security

Two options have been added to the user profile, receipts and purchasing on selection all access to any of these functions will be blocked by default, to allow access simply tick the checkbox against either Purchasing and/or Receipts.

Payroll

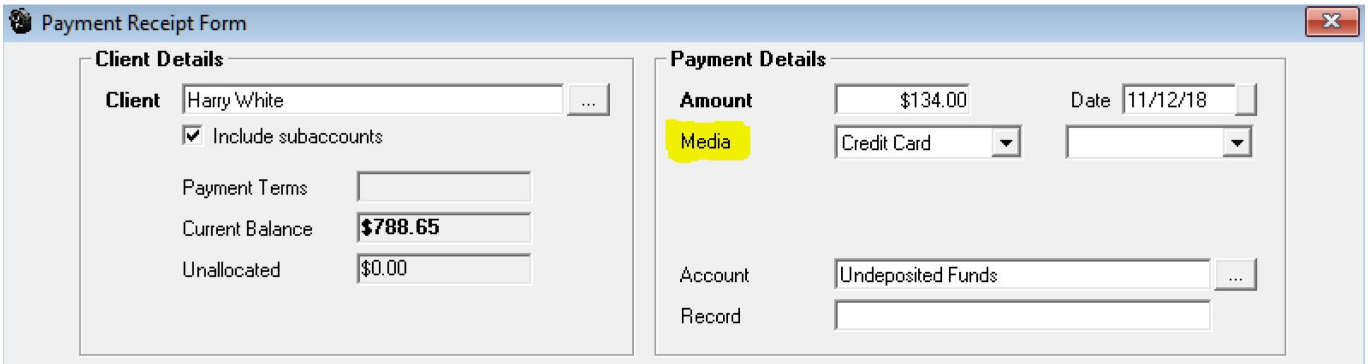
Comments Field: The comments field containing text that prints on the payroll form has been expanded to 2,000 characters.



Payroll PDF: For privacy reasons we now delete emailed PDF's from C:\Automation Client\PDF – If you need to recreate a transaction this can be done by accessing the record from payroll.

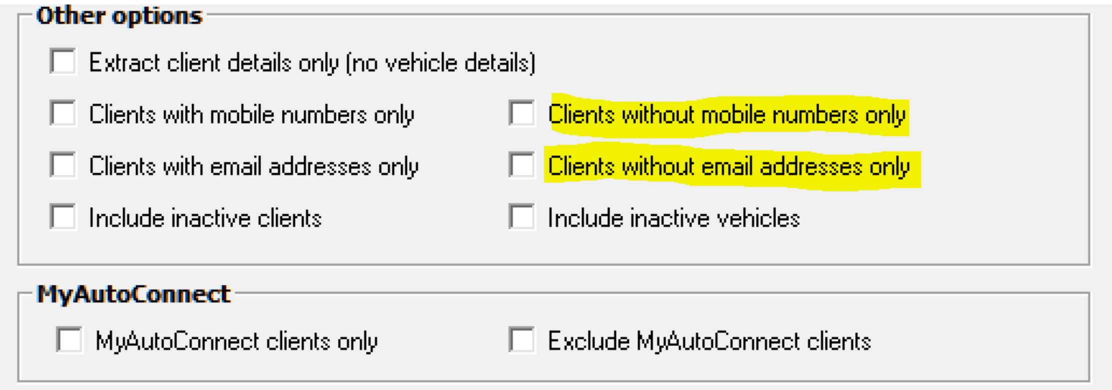
Receipts

Automation no longer enforces the selection of a credit card type when processing receipts.



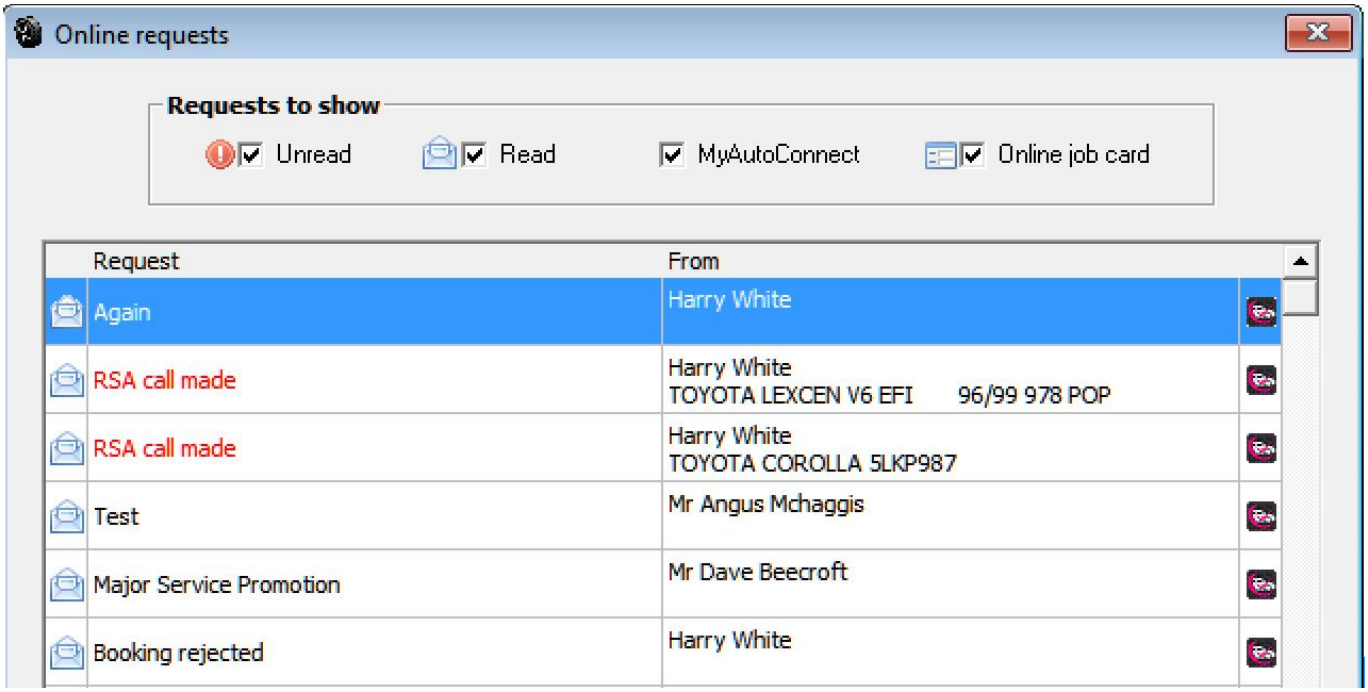
Marketing

Additional Filters: Version 3.6.4 gives you access to two additional filter when querying your data for marketing purposes, clients without mobile number and clients without email addresses. These filters will assist when sending communications such as service reminders via SMS to those with mobile numbers and then selecting clients without mobile numbers to email the communication.



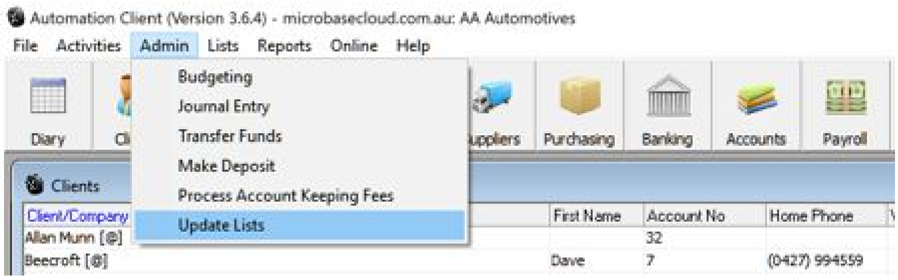
Tasks

Tasks, Online: The online task list has been updated to include filters and display more information making it easier to locate the message you wish to view.

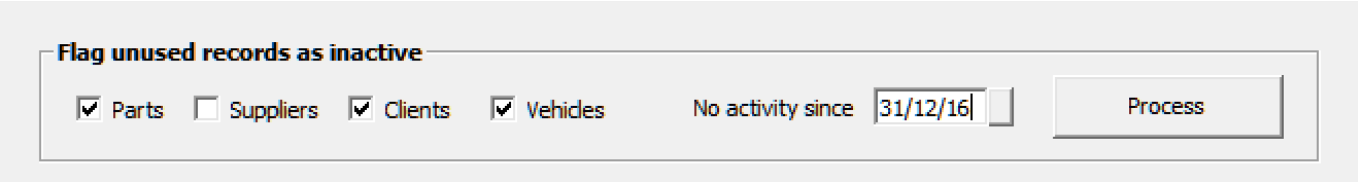


Administration

Version 3.6.4 introduces the ability to make unused records inactive for clients, vehicles, suppliers and parts with no activity since a selected date. This option allows you to manage these lists so you only see active records, inactive records can of course be made active at any time by opening the relevant form and form and removing the inactive flag option.



To access this feature, go to Admin / Update Lists, you will see that there are four list selections, individual or multiple filters can be selected.



Select the lists you wish to update, move over to the date field click on the button and choose your cut off date from the calendar. To complete the function, select process, a progress bar will now move across the screen giving you a totalisation of the records moved to inactive.