Release Notes Automation Version 3.7.0

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Overview

Version 3.7.0 introduces you to a suite of improved management tools that will streamline many of your marketing and accounting functions.

On the accounting side this version incorporates a seamless link with Openpay the integration allows you to process payments directly within Automation which for ease of reconciliation places the funds into a specified clearing account.

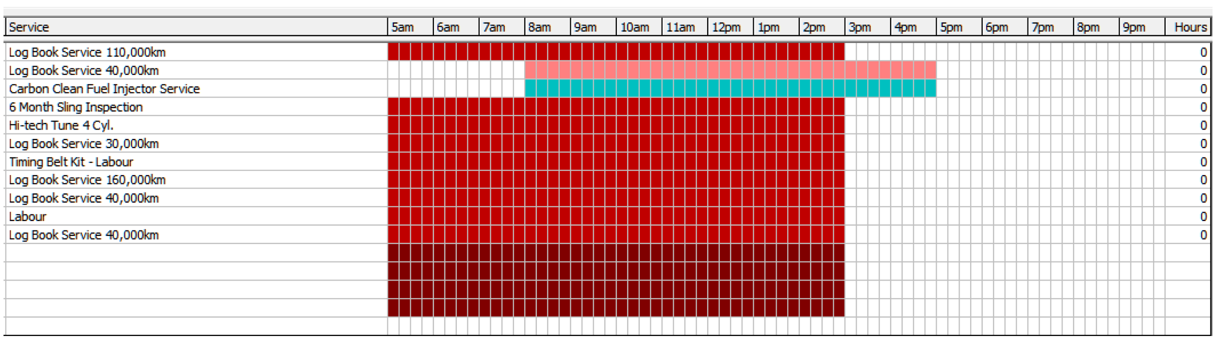
Marketing improvements include the ability to insert client and vehicle details into SMS and email messages plus in data extraction there is a new exclude clients with bookings filter. When creating a booking you will be prompted to convert an outstanding estimate rather than entering a whole new job.

Other enhancements include the ability to track the time an employee is on site; you can also now store multiple mobile numbers and email addresses and choose who you want to contact with via the communication. Many of the forms have additional and expanded fields plus there are new reports for dealers tracking attendance times and emails that have been bounced via the Repco email marketing function.

Please ensure you read these notes to familiarise yourself with the new functionality.

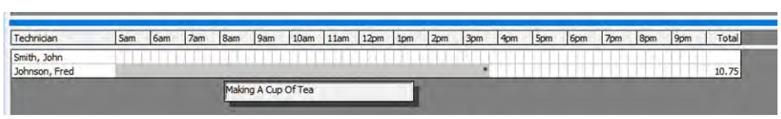
Diary

Diary, time cells: Now has extended time columns with a range from 5.00am – 9.00pm.



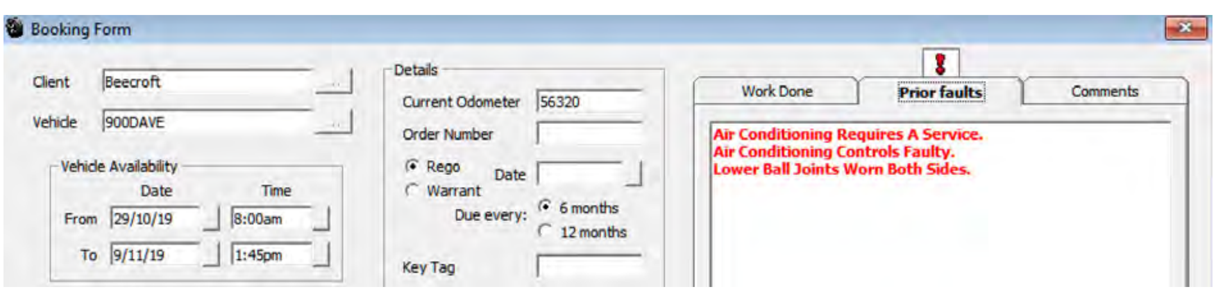
Collection Time: when a vehicle has been flagged as collected hovering the cursor over the entry will display the time the entry was made.

Non-Chargeable time: Hovering your cursor over the technician's allocation for non-chargeable labour from the tech time view with display the task he is currently logged onto.

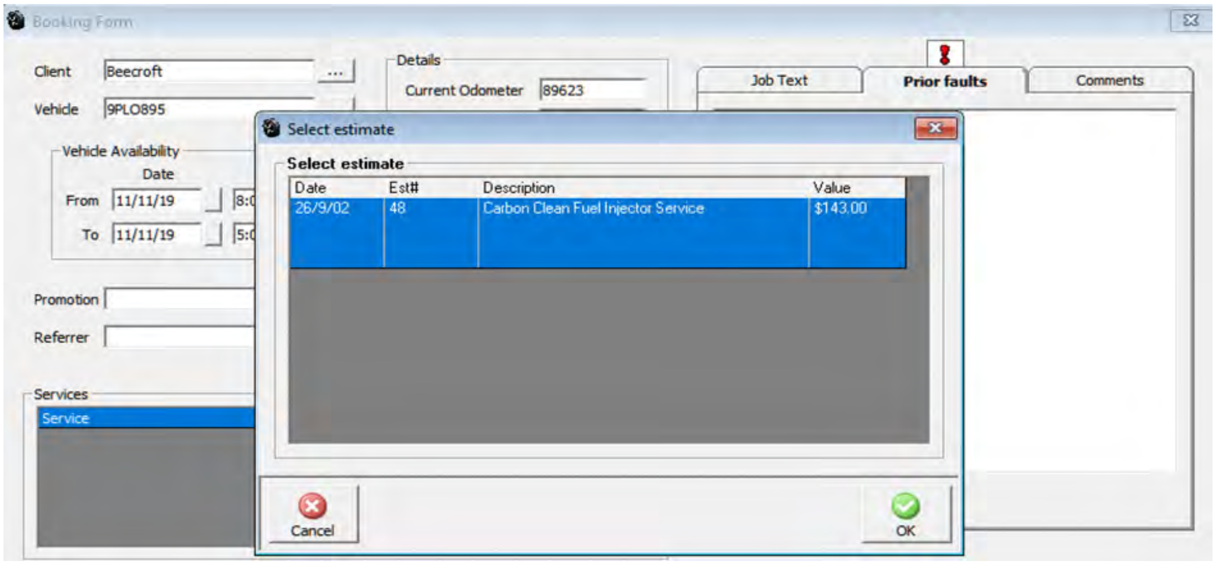


Booking Form

Vehicle faults: Text formatted on the job card in the vehicle faults section now retains the rich text format (Red, Bold, Italics) when creating subsequent bookings.



Estimates: If the vehicle has any outstanding estimates a selection is displayed, selecting one of these options allows you to convert the estimate into a booking or directly into a job.

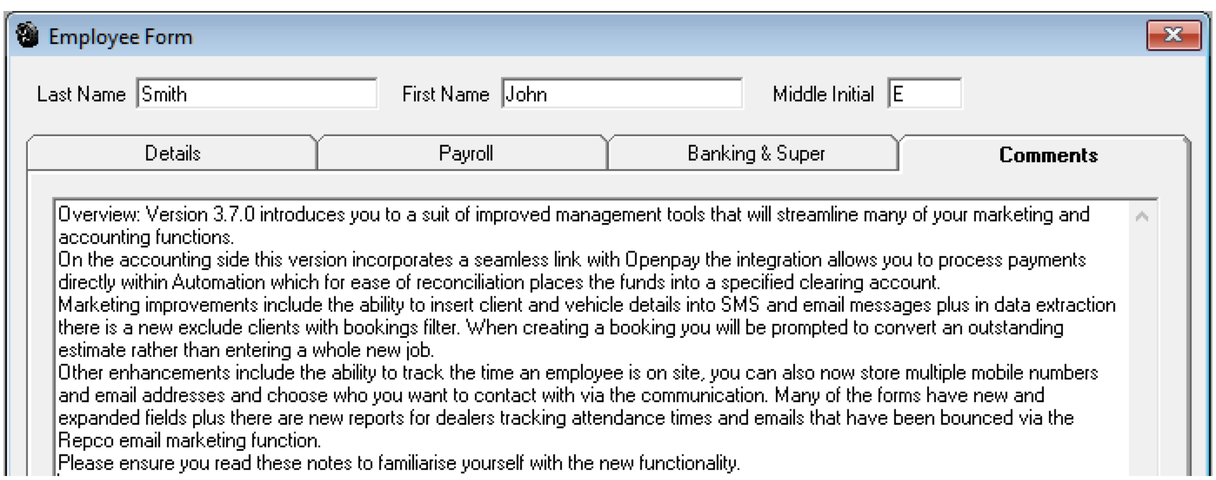


To convert the estimate simply highlight the entry from the list and select OK (F12) you will then be given an option to convert to either a booking or a job card.

Point and double click on your selection and proceed to either create a booing or a job card directly.

Employee Form

Comments: have now been expanded to allow up to 64,000 characters to be entered



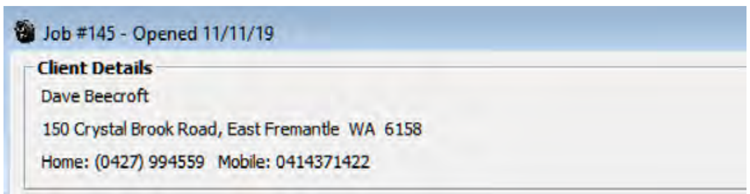
Driver's License Expiry: Added a new field to the details section of the form

Vehicle Form

Build Date & First Date: Version 3.7.0 introduces two new fields to the vehicle form allowing you to record both the build and first registration date.

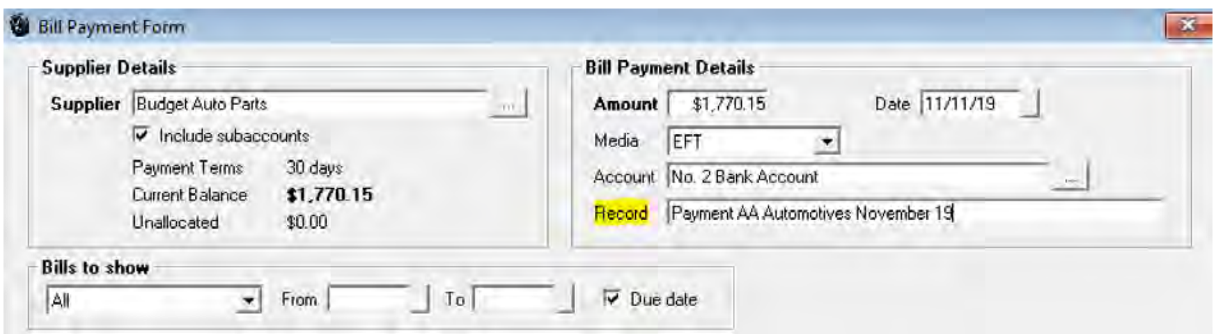
Job Card

Open Date: The job card now records the open date on the top left hand screen, once closed this will change to the closing date.



Bill Payments

Record Field: Expanded – Gives the user ability to provide notes to the supplier, especially if paying via an ABA file.

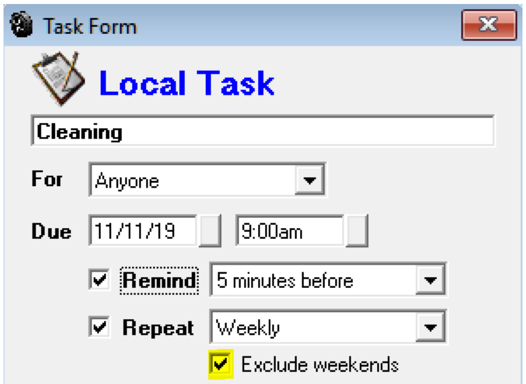


Site Settings

Database Settings / Default New Part: New option available that allows default setup for new part types to be inventory or catalogue

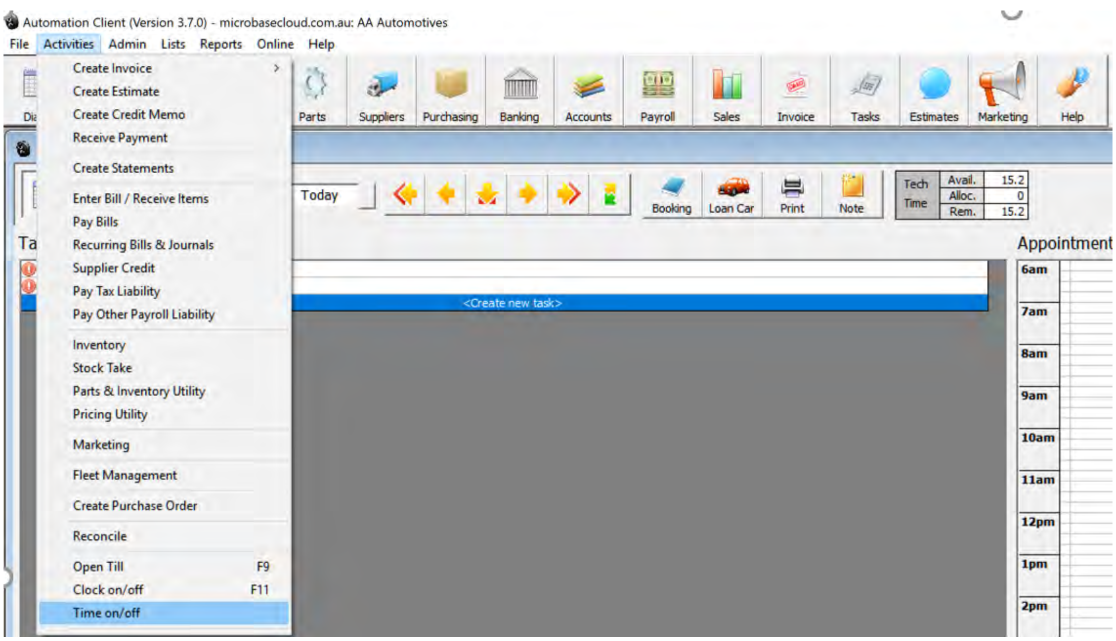
Tasks

Exclude Weekends Option: On creating tasks to be repeated there is a new option that allows the user to exclude Saturdays and Sundays.

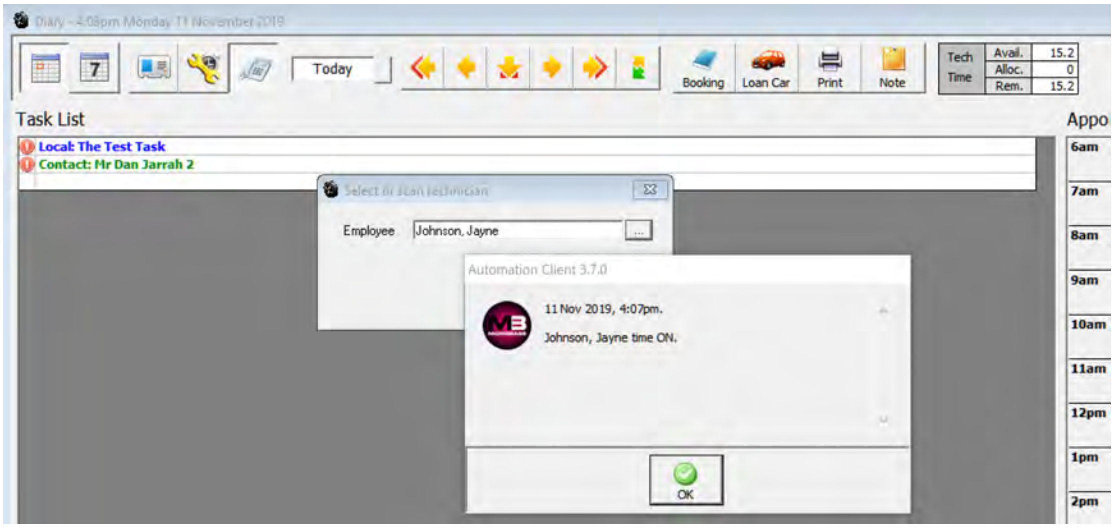


Employees, Clocked Time

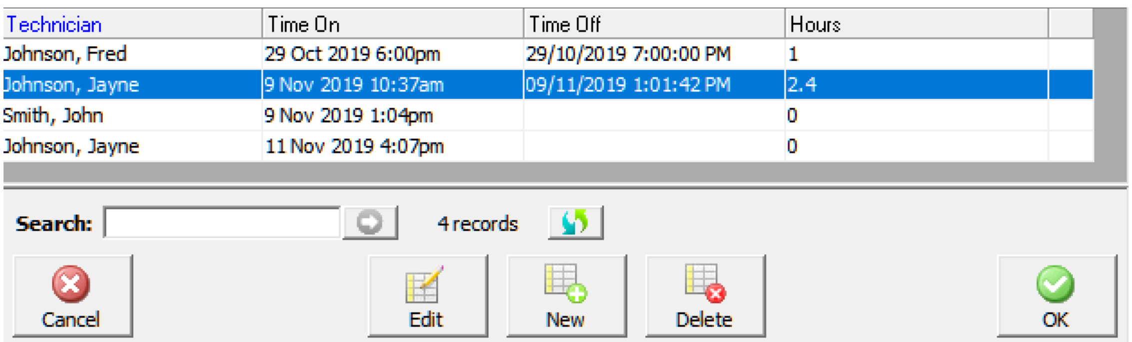
Time on / Off Option: Version 3.7.0 introduces a second running time clock so the user can clock employees on / off for the day to locate the option go to Activities / Time on / Off



On selection you are prompted to log an employee on, the record can be selected from the employee list by selecting the button to the right of the employee field or by scanning the barcode from the employee barcode list.

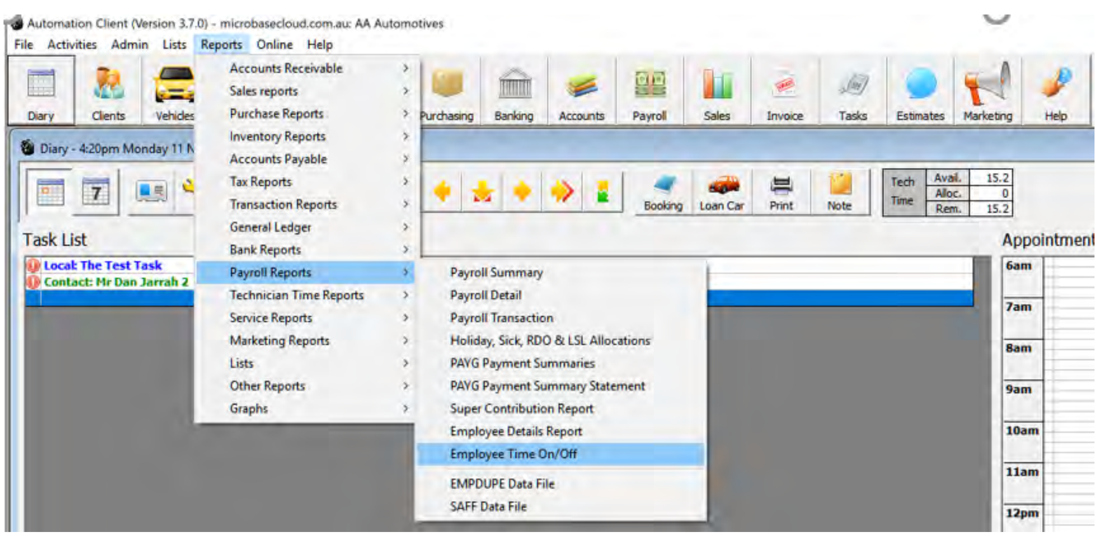


Viewing times: If you wish to view the current clocked times select Activities / Time on/off > View you will see from here times can be added, edited and deleted.



Technician	Time On	Time Off	Hours
Johnson, Fred	29 Oct 2019 6:00pm	29/10/2019 7:00:00 PM	1
Johnson, Jayne	9 Nov 2019 10:37am	09/11/2019 1:01:42 PM	2.4
Smith, John	9 Nov 2019 1:04pm		0
Johnson, Jayne	11 Nov 2019 4:07pm		0

Reporting: There is an Employee Time on/off report available from Reports / Payroll Reports / Employee Time On/ Off



The report can be run over any date range for all or selective employees

AA Automotives

Employee Time On/Off

11/11/2019

For the period 01/10/19 to 11/11/19.

Employee	Time On	Time Off	Hours
Johnson, Fred	29/10/19 6:00pm	29/10/19 7:00pm	1.00
		Total Hours	**1.00**
Johnson, Jayne	9/11/19 10:37am	9/11/19 1:01pm	2.40
		Total Hours	**2.40**

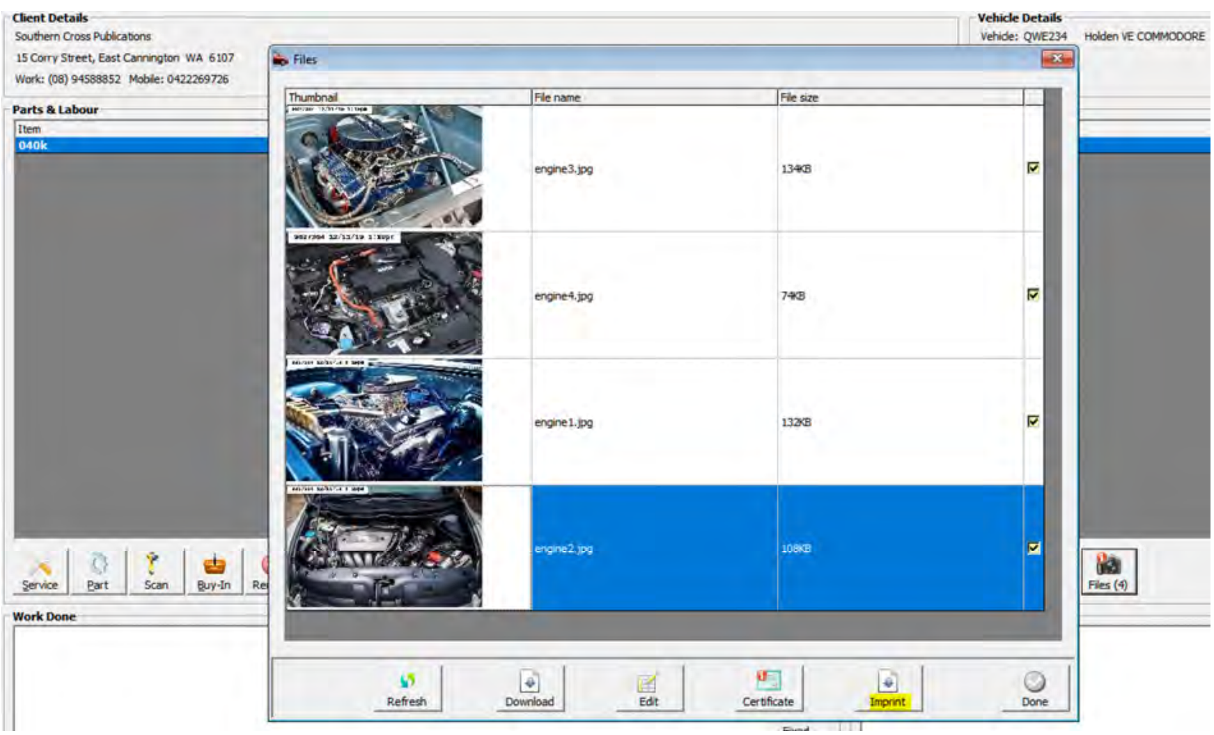
Roadworthy

Photo References: Automation online users can now emboss references onto the photos taken and uploaded during the roadworthy check. To satisfy the requirements of Main Roads auditors these references include the certificate number, creation date and time.

Roadworthy, Embossing Photo References: The process is managed from the job card, firstly upload your photos to the cloud server in the normal way. Click on the files option to view the photo list, over on the right-hand side you will see a checkbox, to flag a photo for embossing point and click in the box.

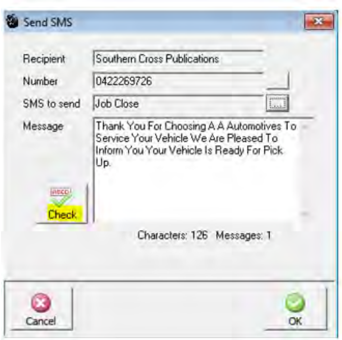
To finalise the embossing process, select imprint from the bottom of the photo display you will now see a reference on the photo on the top left-hand side. To expand the photo simply point and double click on the thumbnail, you will now see the full reference placed on the top left-hand side of the photo.

Please Note: This feature is only available for sites that are hosting their data on the Microbase cloud server.



Spell Check

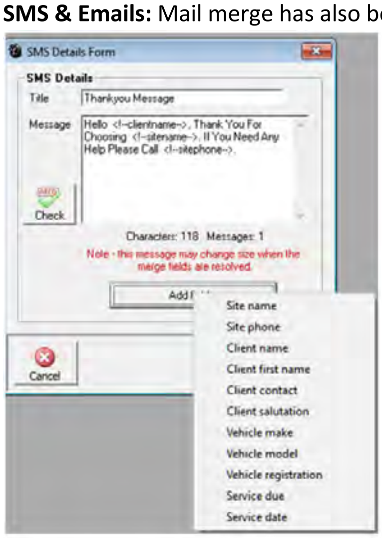
SMS & Emails: The spell check function has now been extended to emails and SMS messaging

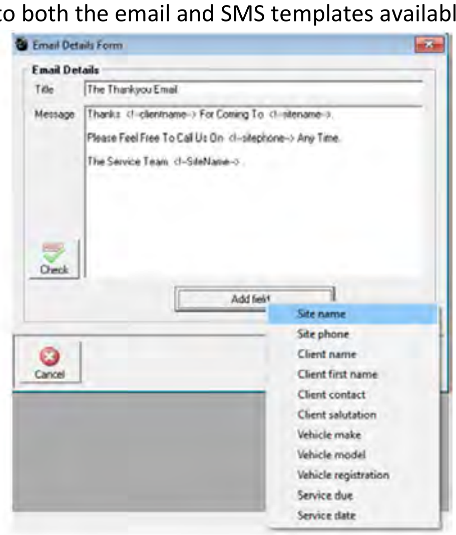


You are now able to check the spelling using the option positioned on the left-hand side of the message box for both SMS and emailed messages. To check the spelling enter your message then select the option and accept or ignore the corrections.

Mail Merge

SMS & Emails: Mail merge has also been extended to both the email and SMS templates available from the lists menu.



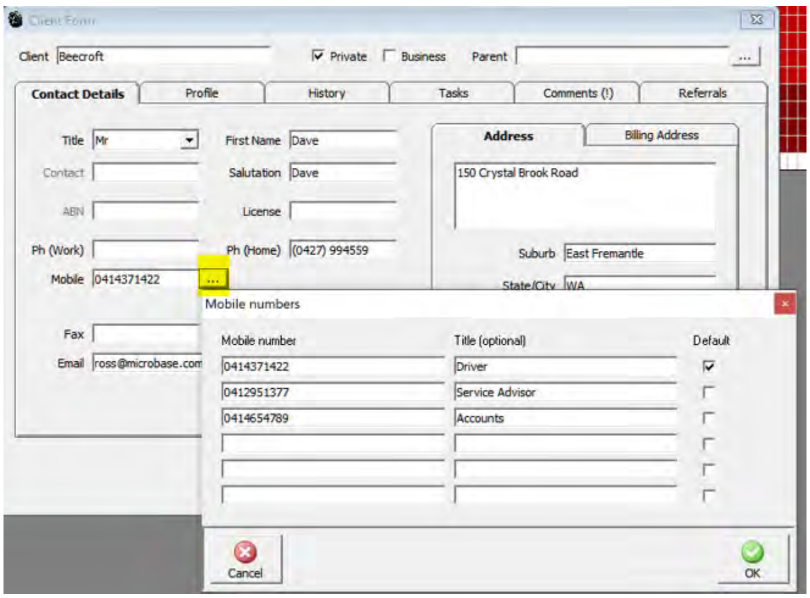


Adding Merge Fields: Place your cursor where you wish the merged information to appear in the SMS or email message, next click on the add field option positioned under the message area. Highlight the field you wish to insert into the message and double click on the option, you will see a title enclosed in the lesser / greater than brackets indication where the merged information will appear.

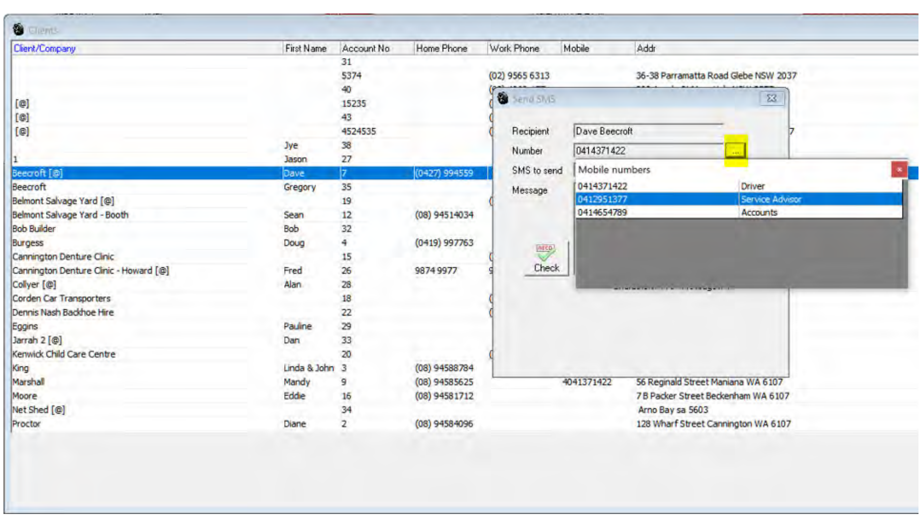
SMS Multiple Mobile Numbers

Multiple Mobile Phone Numbers: The client form has been modified to accommodate up to 6 mobile numbers either of which can be selected when sending an SMS from anywhere in Automation. For ease of reference there is a free typing title field included against each record.

Entering Multiple Mobile Numbers: Go to the client form, from the contact details tab select the button to the right of the mobile field, you will see you can now enter up to 6 mobile numbers, you also have the ability to free type a reference on the right-hand side under the title (optional) column. You will need to set one entry as a default, this will be the phone number used when no selection is initiated.



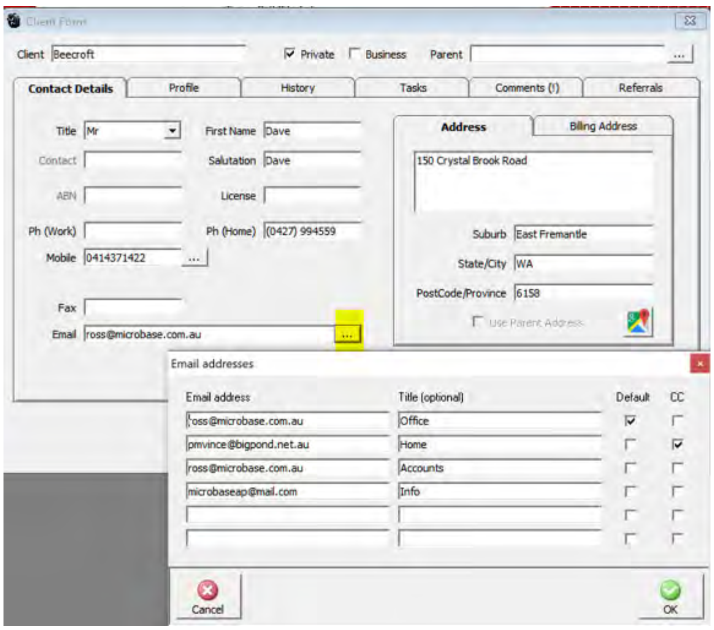
SMS, Selecting A Mobile Number: when selecting to send an SMS from anywhere in Automation you are presented with the send SMS display, the number displayed will always be the default entry. If you wish to SMS an alternate simply click on the button to the right of the number field, from the list displayed select the entry you wish to contact and double click, the alternate is now displayed, to complete the process select the OK option from the send SMS form.



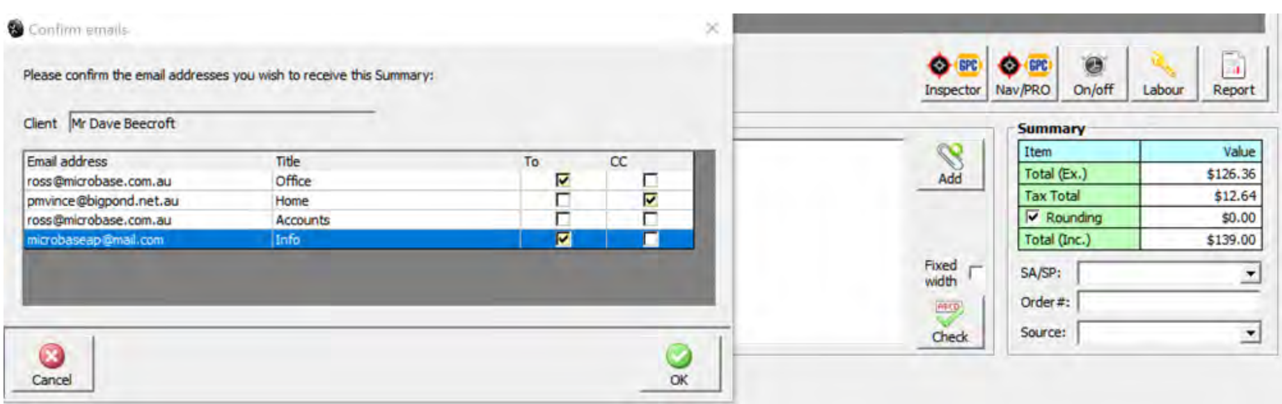
Email

Multiple Email Storage: Version 3.7.0 allows for the recording of up to 6 email addresses on the client card, one address can be set as a default plus a cc adress can also be chosen. The default and cc, if selected will be used when emailing statements to your clients, for all other email communications you can select which email address or addresses you wish to send the text and or attachment to from anywhere in Automation where we provide an email option.

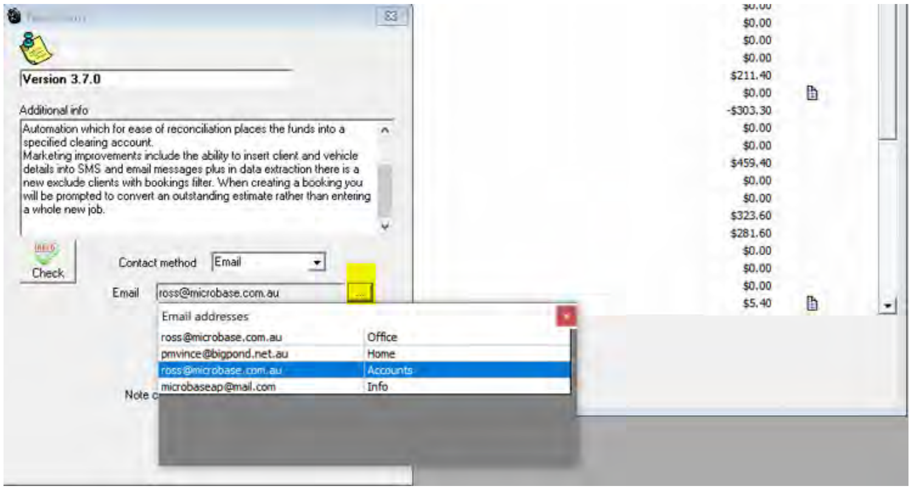
Multiple Email Addresses, Recording: Open the client form, locate the email field down on the bottom left-hand side of the form, if you simply wish to record one email address type this into the empty field and it will become the default. If you want to record multiple address click on the button to the right of the email field, a sub screen is displayed, here you can record the address and use the title field (if you wish) to record a function ie: accounts, fleet manager, driver ect. To save your entries select OK(F12).



Email Addresses, Selecting: When you send emails from the job card on selecting the email option you will see a list of email addresses the default main and CC (if selected) are flagged as receipents. If you wish to alter this setting simply select or deselect from the checkboxes.

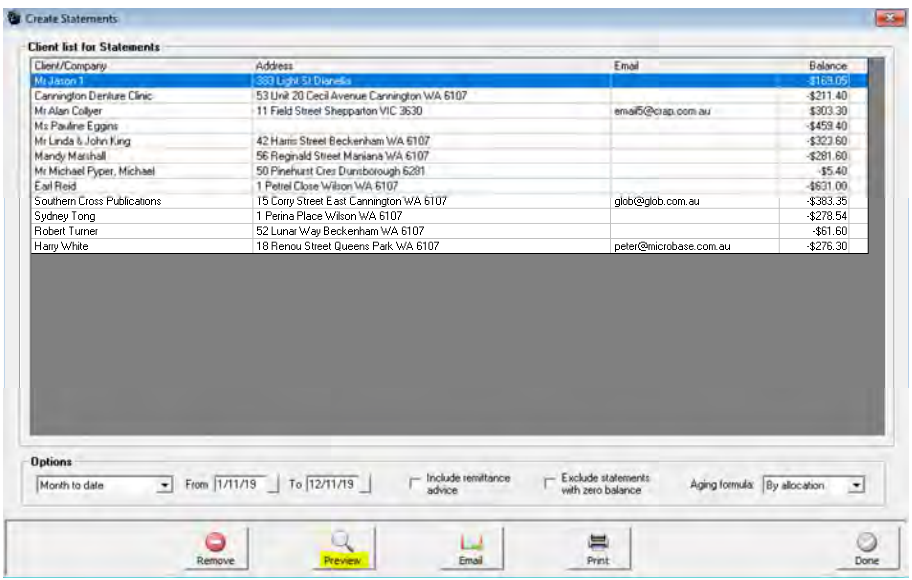


You can also access the email list recorded in the client form by selecting email from the task bar of the client listing while highlighting the client you wish to communicate with. The same form can be accessed from the client card / tasks / notes > Contact Method > Email. To view the emails available click on the button to the right of the email field, highlight the address you wish to use and double click, the email will now be visible on the form, select OK (F12) to complete the process.



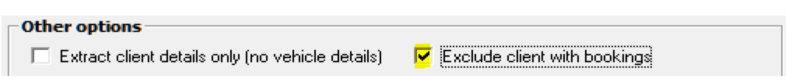
Statements

Previewing Statements: It is now possible to preview individual statements from the create statements display. Select activities / create statements > outstanding or selective, a list of statements to be processed is in view to preview an entry, highlight and select the preview option located at the bottom of the screen.



Marketing

Exclude Clients With Bookings: Version 3.7.0 introduces a new filter option to the marketing data extraction screen, when flagged to true whatever search is performed ie: service reminders, vehicles with current bbokings will be ignored and as such not appear in the results list.



Repco Marketing

Bounced Emails: Automation version 3.7.0 can now access Repco records for bounced emails. These records are generated when an email sent via a marketing camapaign is not able to be delivered. To access, select Reports / Marketing / Bounced Emails


AA Automotives III

Bounced emails

13/11/2019

For the period 01/01/19 to 13/11/19

Date	Client	Email
30/10/19	Dave Beecroft	gt@crunchyfrog.com.au
30/10/19	Sean Booth	gt@crunchyfrog.com.au
30/10/19	Belmont Salvage Yard	gt@crunchyfrog.com.au
30/10/19	Southern Cross Publications	gt@crunchyfrog.com.au

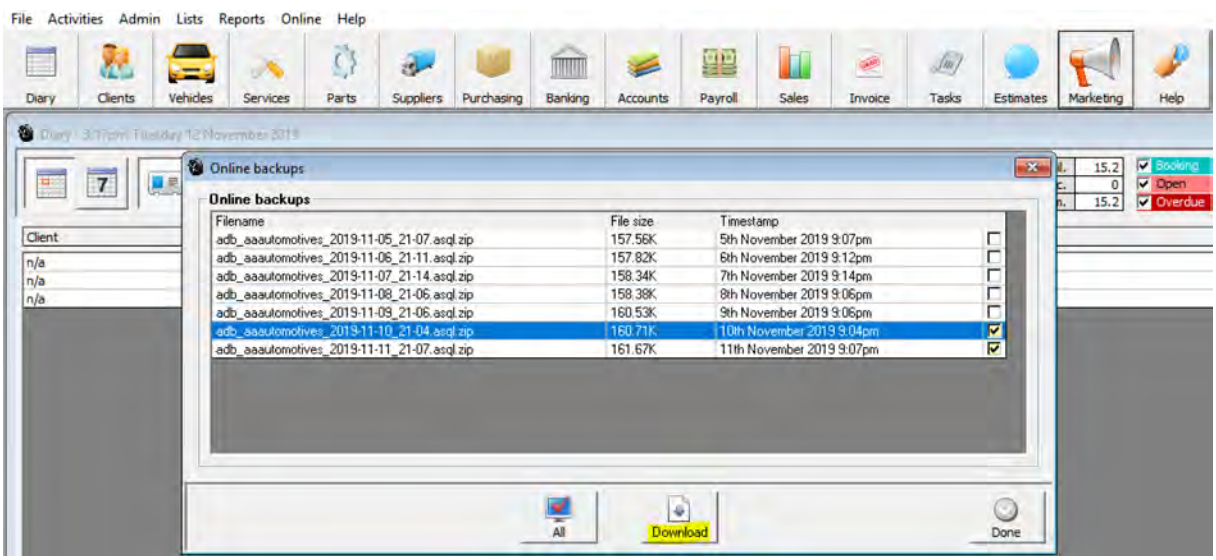
Format includes bounce date, client name and the email address.

Note: Only Repco locations have access to this report

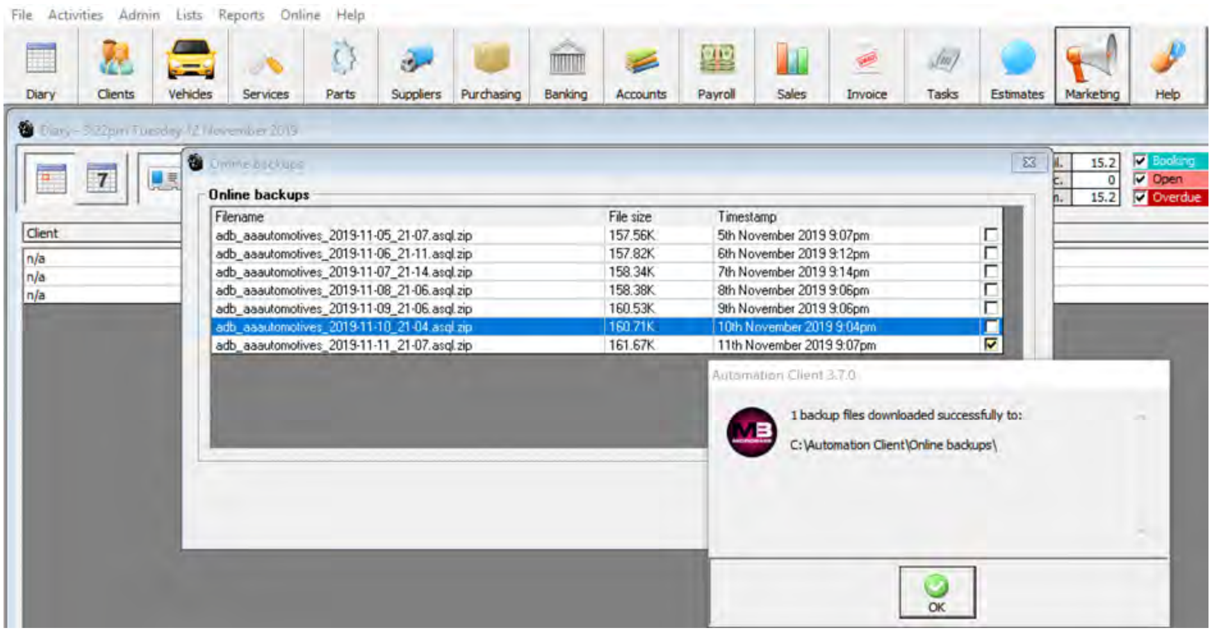
Online Backups

Storing Online Backups Locally: Sites that are storing their data on the Microbase cloud server there is a new Online Backups option. This feature allows users that need a copy of their data or who decide that the 7 day backups across 3 x servers that Microbase store are insuffecient for their needs, functionality allows for the site to download any of the backups Microbase are currently storing on their behalf and place them into a local folder.

Downloading An Online Backup: From the top of screen select Online / Online Backups, this action will connect you to the backup folder located on the Microbase server, you will see backups for the last 7 days in date order. Select the backups you wish to store locally, to finalise select the download option at the bottom of the display.



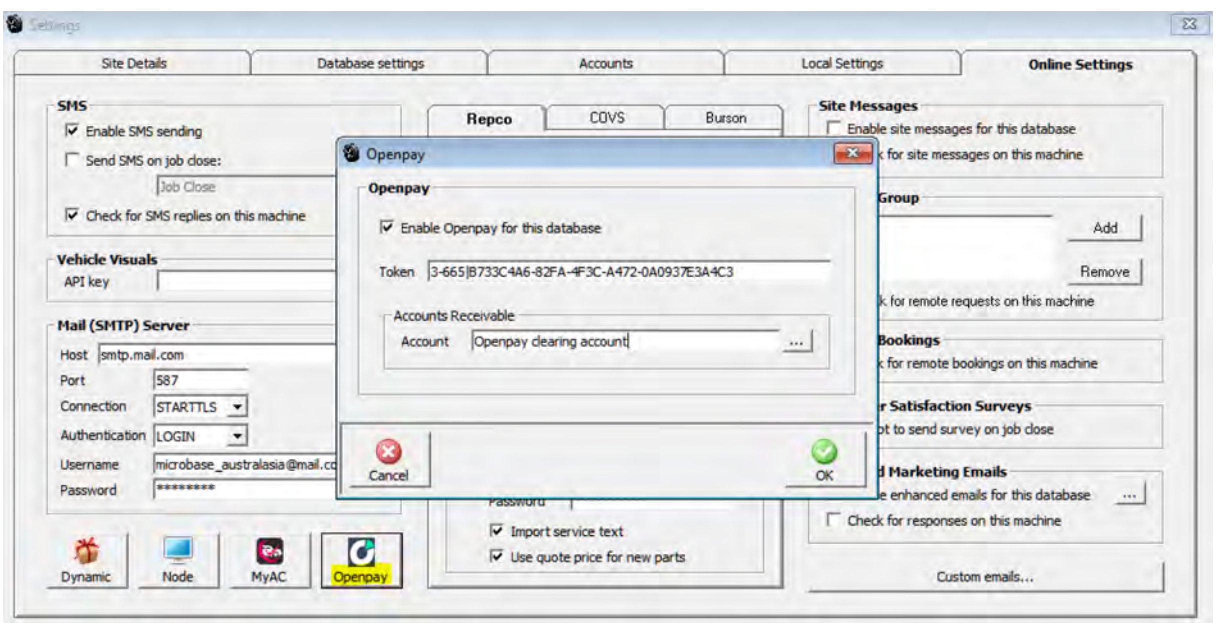
By default the backups will be downloaded to C:\Automation Client\Online Backups they can then of course be moved to an alternate location.



Openpay

Overview: Automation now interfaces with the Openpay online network, this new feature allows you to process billings directly to Openpay, once authorised the pending payments due are deposited to an Openpay clearing account (bank account) you will need to create this account via your account list for information on how to create a clearing account click on this link *Clearing Accounts*. You can use this account to transfer payments as they are received directly to your bank via the transfer funds option available from the admin menu. You can also pay any fees due to Openpay from the clearing account by raising a bill in purchasing for outstanding processing fees and then paying from the Openpay clearing account.

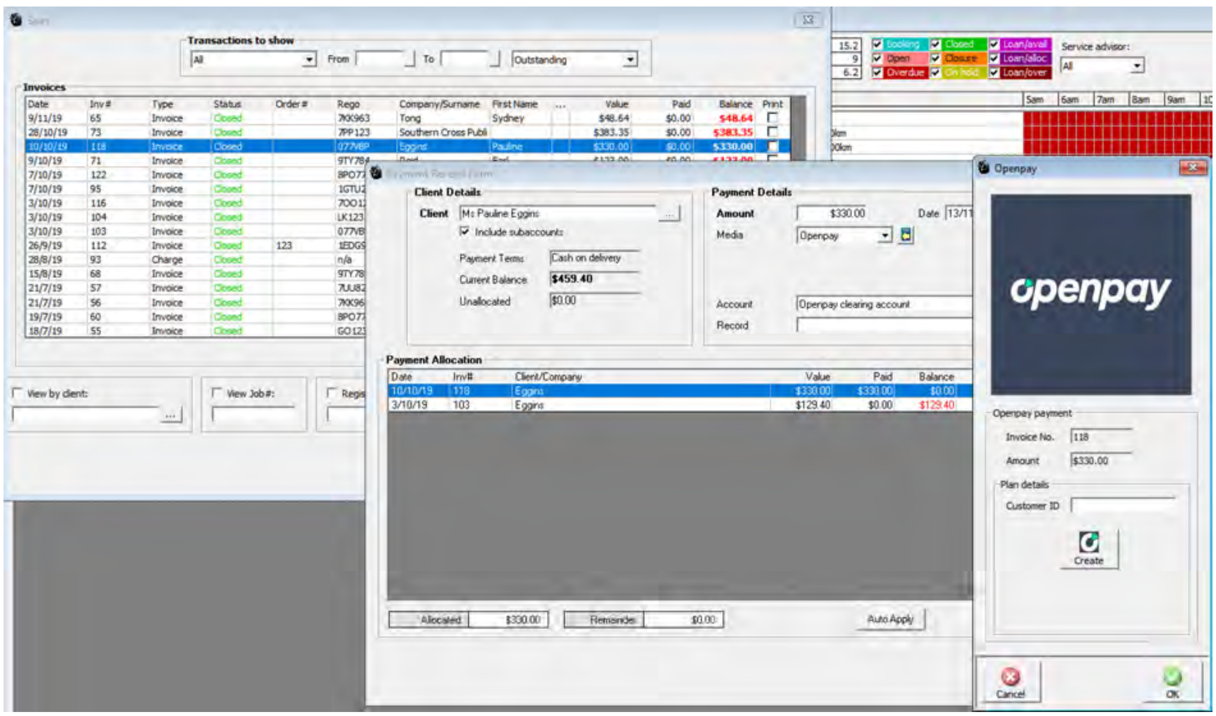
Enabling Open Pay: To accept Openpay you will first need to **enter your token details provided by Openpay**, if you do not have a token please **contact Openpay direct as Microbase does not have the ability to generate these credentials.** Next go to File / Site Settings / Online > Openpay Option.



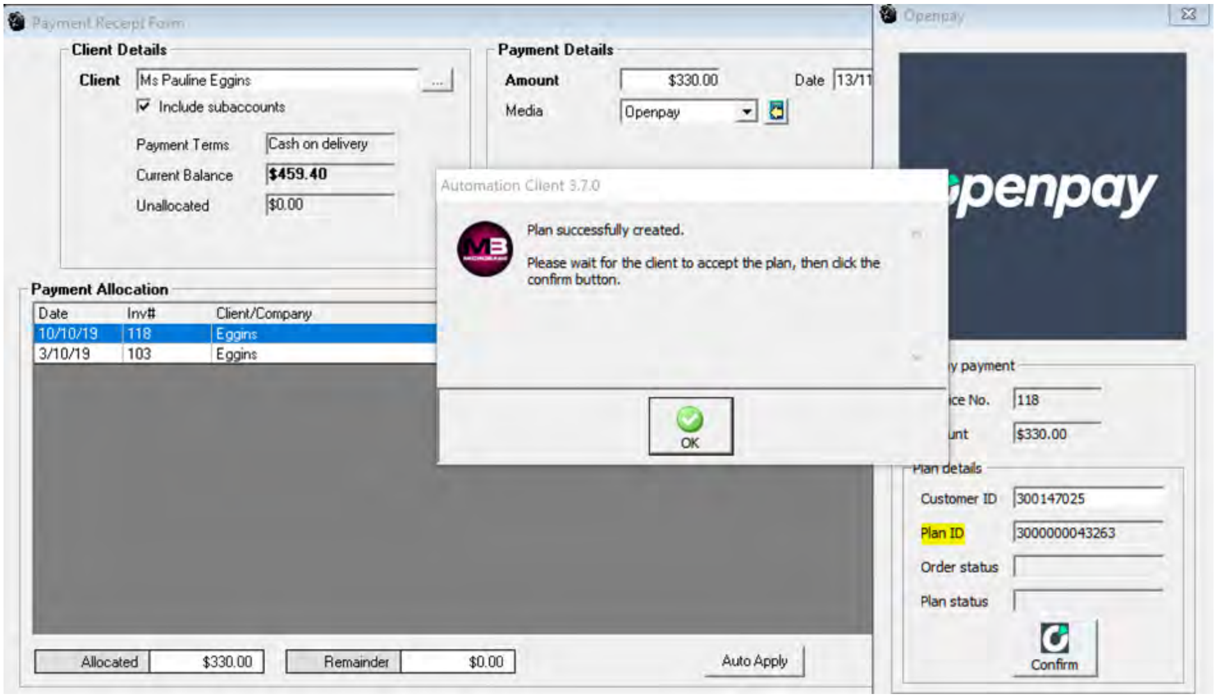
From the Openpay screen select the enable Openpay for this database option, enter your token number, we suggest you receive all openpay payments into the Openpay Clearing Account (you will need to create the clearing account), you can if you wish use an alternate, selecting the button to the right of the account field will open the account list, point and double click on your selection and save with OK (F12). We strongly suggest you separate your Openpay transactions as this will make for easy reconciliation when transferring to your bank or paying any Openpay charges. Save your settings with OK (F12) from the Openpay and site settings display.

Openpay, Transaction Processing: Firstly, it is important to note that Openpay need to receive details of the transaction, for this to occur you can only process Openpay from either the payment option as you close the job card or charge invoice and the sales screen by highlighting the transaction and selecting payment from the bottom of the screen. Please be aware that you can't process multiple invoices in one Openpay transaction, each invoice will need to be authorised and processed individualy.

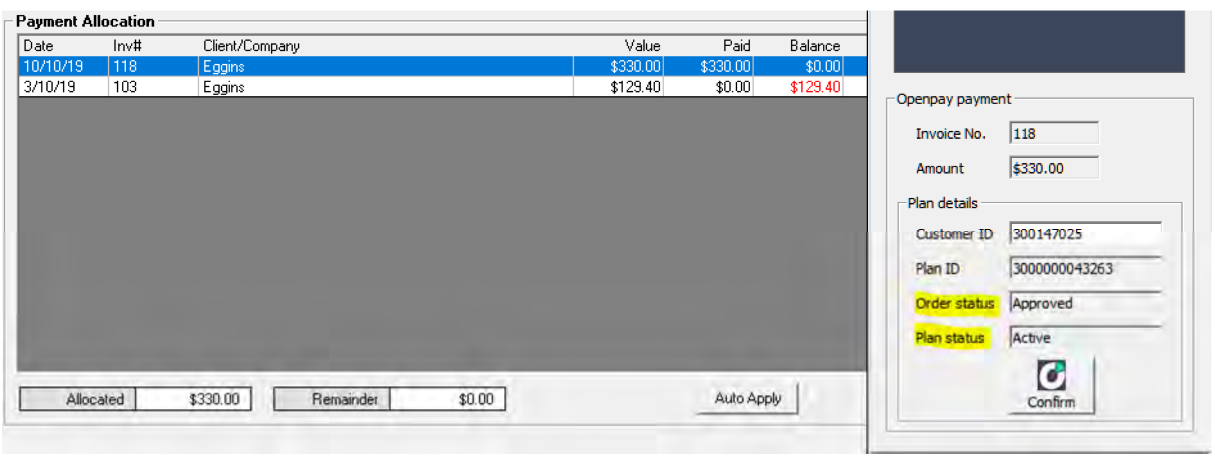
From the sales screen highlight the invoice you wish to process via Openpay or if proceeding from the close job card form simply click on payment. In the payment receipt form make sure the correct transaction is flagged for payment, move up to the media filed and select Openpay, a sub screen will open requesting you to enter the customer ID. Enter the details and select create.

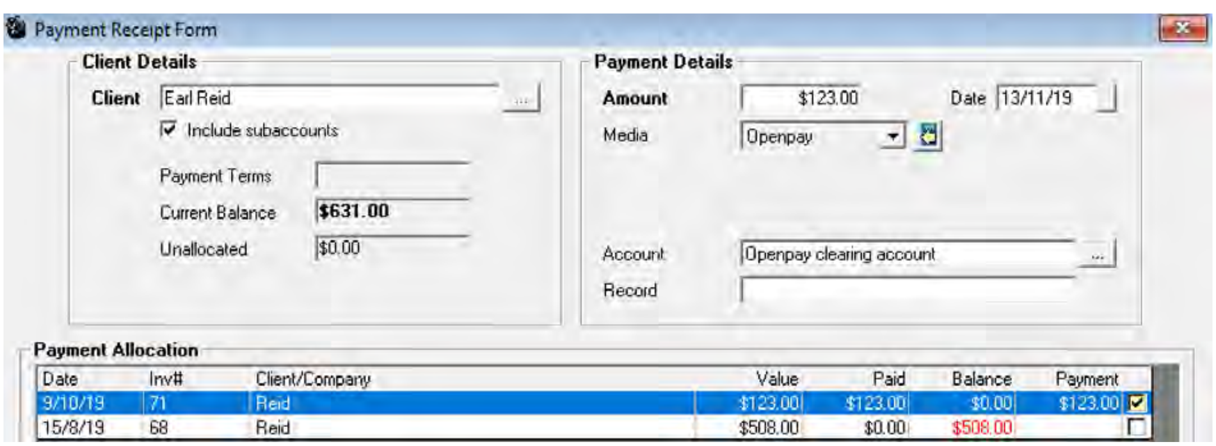


The client will via the Openpay application receive an intention to buy notification, before you can proceed they need to accept the payment plan and select proceed from their smart phone. You will see a message informing you that the plan has been created, a reference number is inserted into the Openpay sub form, once the client accepts the plan you can select the confirm option.



You will now receive an order and plan status indicator, approved and active, to deposit the payment into your Openpay clearing account select the OK (F12) option at the bottom of the form, you are then taken into the Automation payment receipt form showing the paymet and the account it has been deposited to.





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