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Automation Client Version 3.7.5 (2020)

Overview: Version 3.7.5 contains many new features that are geared toward improving the daily efficiencies within your business.

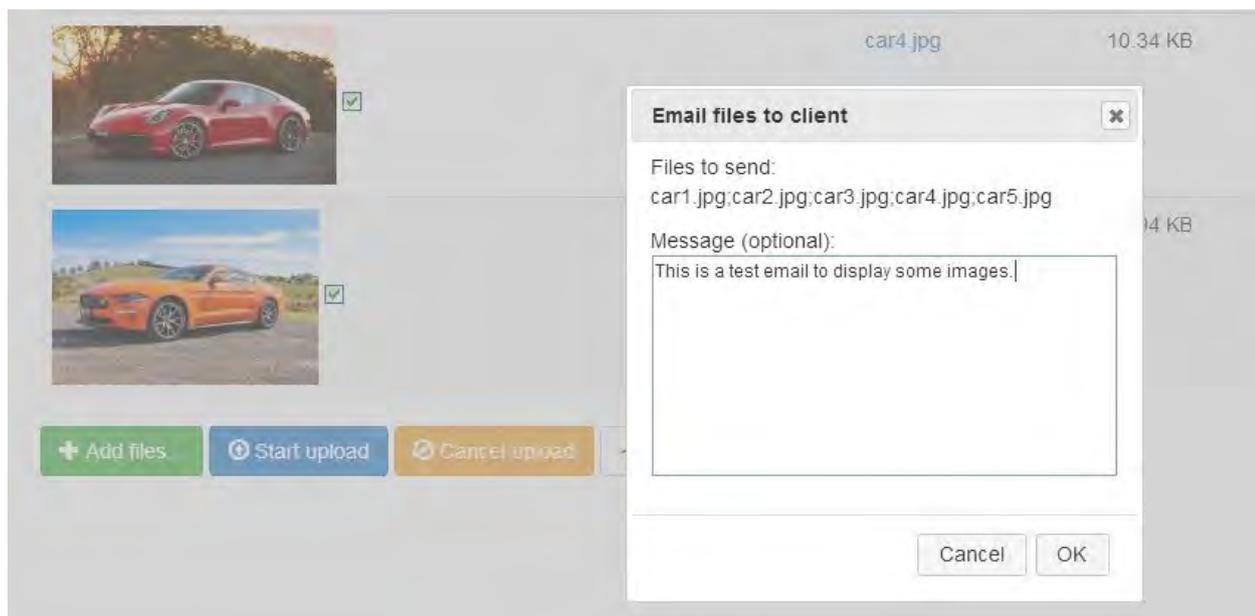
As an example, we now store more information on the vehicle form, clients using Smart Inspector will see failed items and any relevant notes printed in the vehicle reports section of the invoice. We have made it easier for you to locate vehicles and jobs on the diary screen by introducing a new search option on the sales screen.

This version also allows for email and SMS communication with suppliers, changes to payroll have been introduced to allow you to pay an employee by clocked hours, there is a new search option in purchasing that allows you to easily track single or multiple payments applied to a supplier invoice.

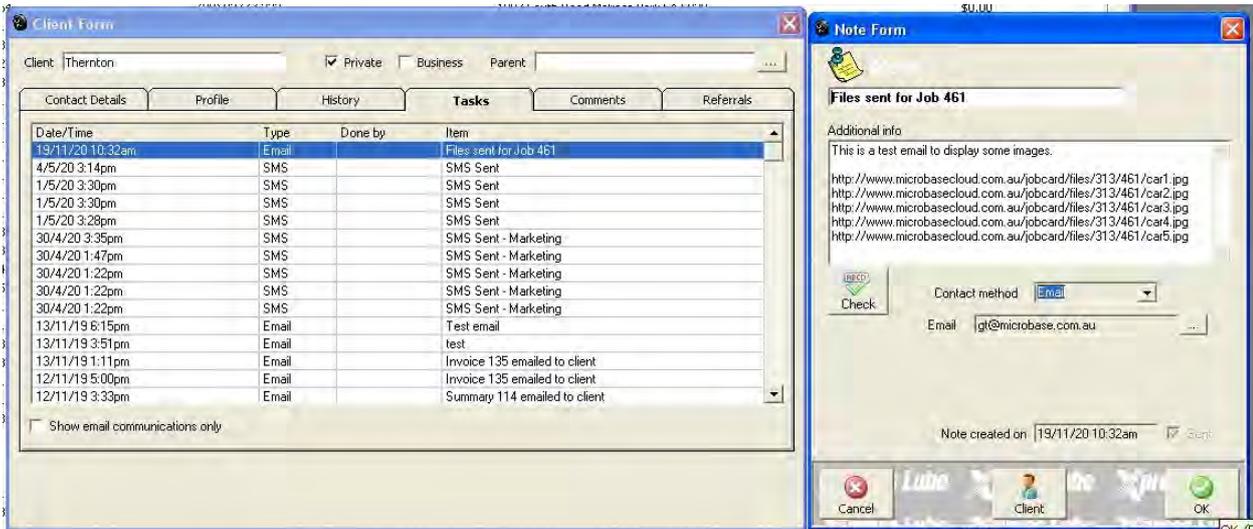
To gain the maximum benefit from the new and improved functionality of version 3.7.5 we strongly recommend you take time to read the release notes.

Emailing Images, Recording:

When photos are sent to a client via email from the online job card, this will be recorded in the Client form -> Tasks tab. To email single or multiple images to a client go to Online job card, choose the job, click on the Files, then tick the images you want to email and click Email Client. Go OK, the email will be sent.



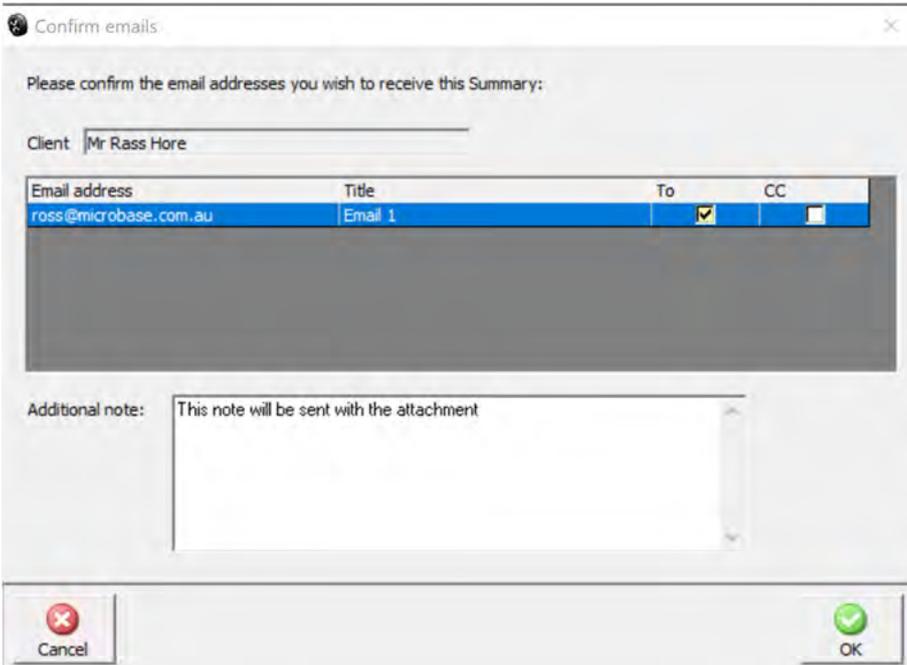
Go back into Automation Client, open the Client Form and view the Tasks tab. You will see the line item – double click to open up and see the list of images sent to the client with URLs.



Note also there is a “Show email communications only” checkbox available to filter the view of Tasks to emails only.

Emailing Estimates, Summaries or Invoices, Additional Note.

When emailing estimates, summaries or invoices to clients, it is possible to have an additional text note to accompany the email. Go to the job card and click Email. You will see a text box for the additional note.



Note: This option will not appear if you are using a custom email template (selected from Site Settings / Online > Custom Emails)

Booking Form

The printout of both the New Client/Booking form and the booking form will have the Series of the vehicle shown. They will also have new options: Google, Facebook, Twitter, added to the “How did you hear of us?” section.

The booking sheet will also have "Account" payment option checked if that client has the Charge Account option ticked in their Client Form / Profile tab.

Payment method (please indicate)

Cash EFT Credit Card
 Cheque Account Other _____
 Openpay

Vehicle Form

The Vehicle form now has CVT and DSG options available, as well as a field for state of registration.

Vehicle List

The series has been added to the list, this can also be searched by highlighting the header of the series column and typing into the search field

Rego	Make	Model	Series	Last Service Date	Next Service D...	Next Service	RSA Number	RSA Expiry Date	Ref	Driver	Contact	VIN
08NR	2008 AUDI	Q7	4LB									WAUZZZ4X8D02425C
17JNAT	2016 BMW	X4	F26	24/4/20	24/4/21	SERVICE						WBAXX120200531282
18JNAT	2006 BMW	X5	E53	22/5/20	22/5/21	SERVICE						WBAPB72020L95058
1AKH395	1994 BMW	M3	E36	31/10/19	31/10/20	SERVICE						WBSFP92000EA67740
1AMP096	1997 BMW	Z3	E36	26/6/20								WBACH72000LB04735
1ARS736	1994 BMW	540I	E34	29/4/20	8/4/21	SERVICE						WBABE62070GF21381
1AZI862	2001 BMW	330CI	E46	28/2/20								WBABN52000J73146
1AZK534	2001 MB	E200K	210	5/2/20								WDB2100482B317525
1BAO101	1998 MB	CLK320	208									WDB2083652F050104
1BBG057	2001 AUDI	A4	8e	7/8/20								WAUZZZ8E12A112411
1BBH791	2002 BMW	325CI	E46	28/2/20	3/3/21	SERVICE						WBABN32050JW3336

Job Card

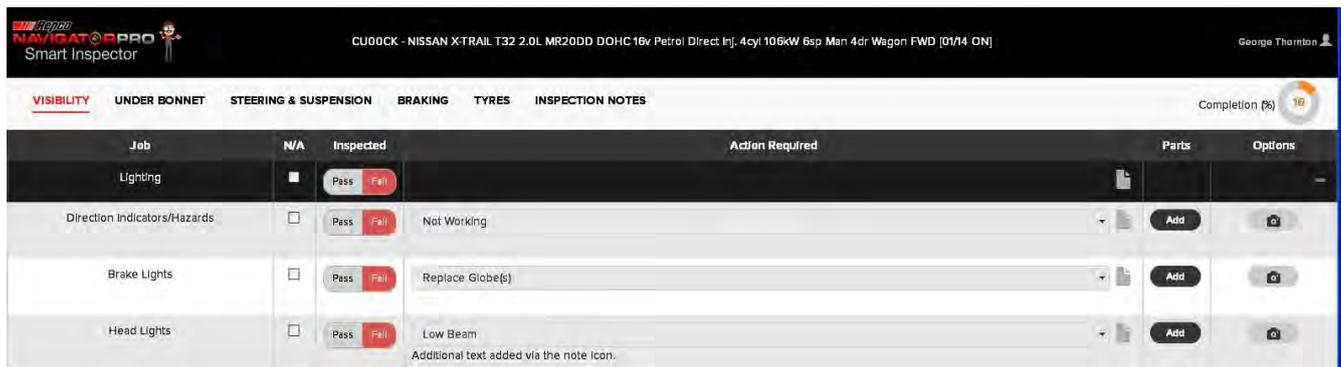
Registration due date is now displayed in the header record, also on the job card header bar we now display both the opening and booked dates.

Smart Inspector

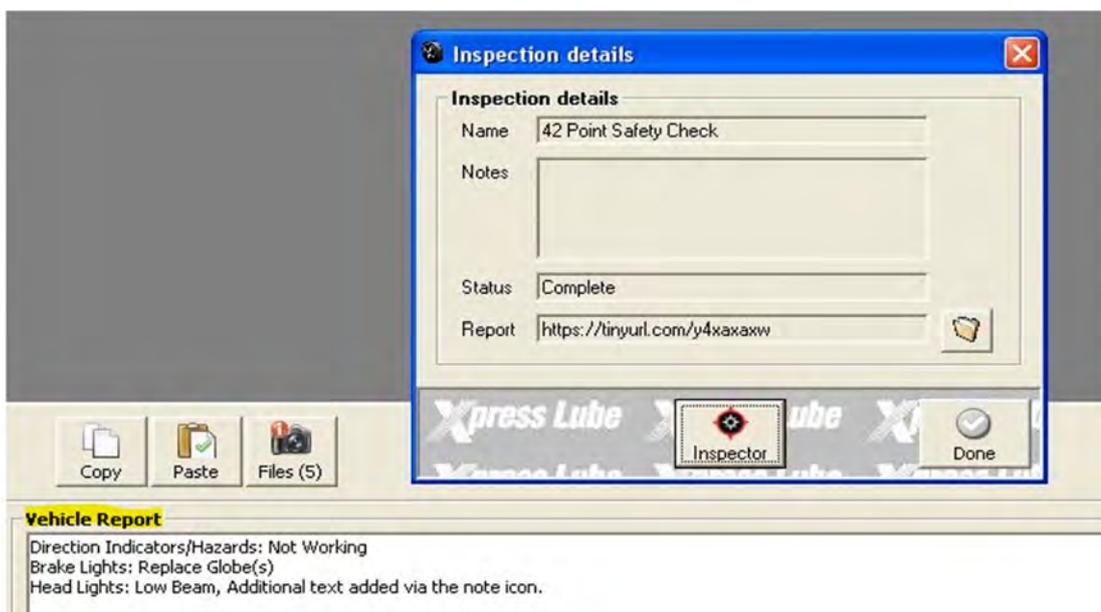
Vehicle faults documented in the inspection will be imported onto the job card when the inspection is complete. This only applies to items flagged as failed in the inspection. It will also include any additional text added via the smart inspector note icon.

Step 1: Create an inspection as normal via Automation on a job card.

Step 2: Go into Smart Inspector web interface and complete the inspection, noting any failed items with optional additional text.



Step 3: Back in Automation on the job card once more, click the Inspector button again to update the inspection details. The results will be imported:



Job Card, Invoicing Zero Retail Items

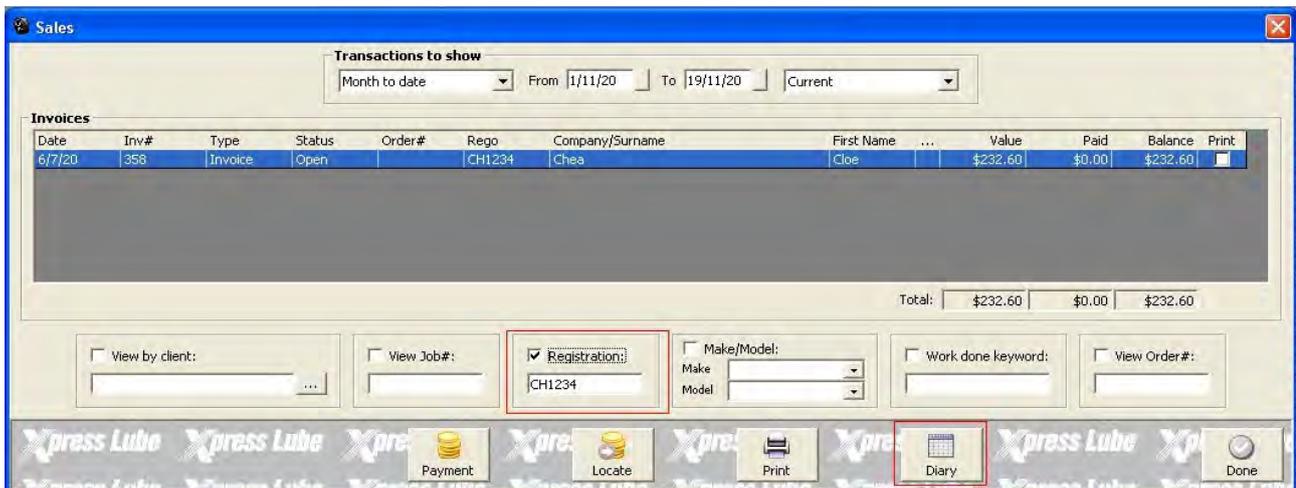
Items sold for \$0.00 will now show as \$0.00 on the printed invoice:



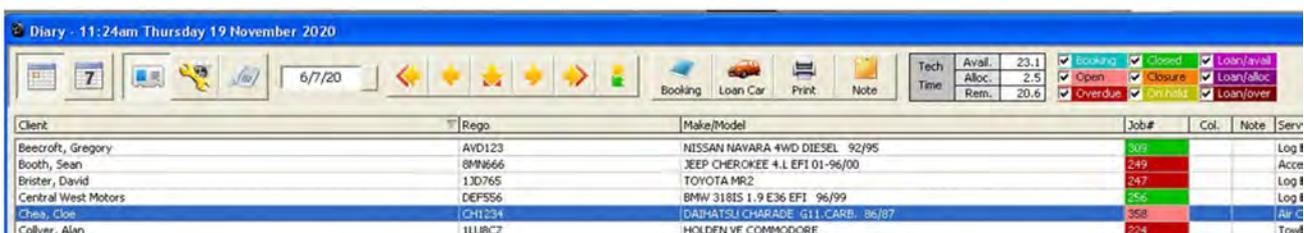
Diary Search Function

Step 1: First go to the Sales screen. Enter the vehicle registration you wish to search for in the filters at the bottom.

You can choose any filters you like, including client, Job#, date range, etc. so a search is not limited to just the vehicle registration. Once you've found the job you want, highlight it and click the new Diary button at the bottom of the screen (**NOT** the diary button at the top left on the taskbar).



Step 2: This will now take you to the diary with the appropriate date already displayed and the job in question highlighted



Employee Details Report

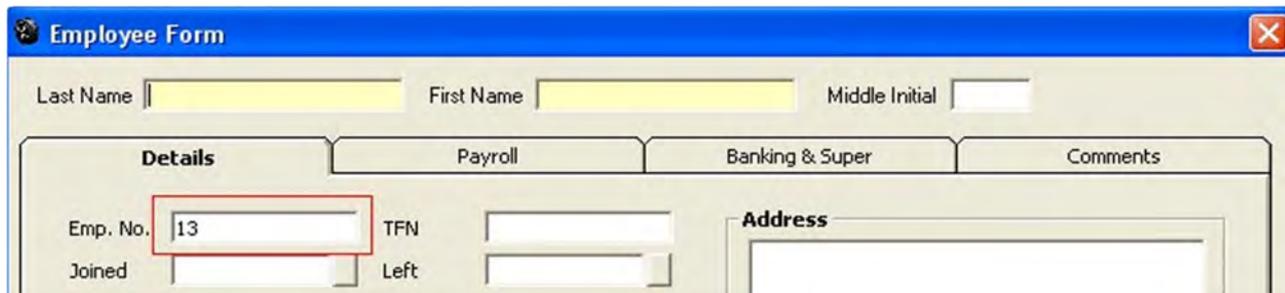
This report (Payroll reports -> Employee Details Report) has additional details as shown on the Banking and Super tab on the Employee form, such as the bank account and the super funds.

AA Automotives
Employee Details Report
 19/11/2020

Last Name	Blackie	First Name	Scott	Middle Initial	
Employee #	234234	TFN	234324	Address	22 Smith St
Joined	4/11/20	Left	20/11/20		
Type	Full-time	Class	Super	Suburb	Smithville
Date of Birth	12/11/20	Gender	Male	State	Perth
Phone	1238 1238	Mobile	9928 2872	PostCode	WA
Email	email@email.com				
Drivers License					
Emergency					
Notes	Hello				
		Bank Account Name	Bank		
		Bank Account			
		BSB	1234		
		Account #	5678		
Super Fund	Member #	Joined date	ABN		
Sunsuper	999999	15/4/20	1231 23213		

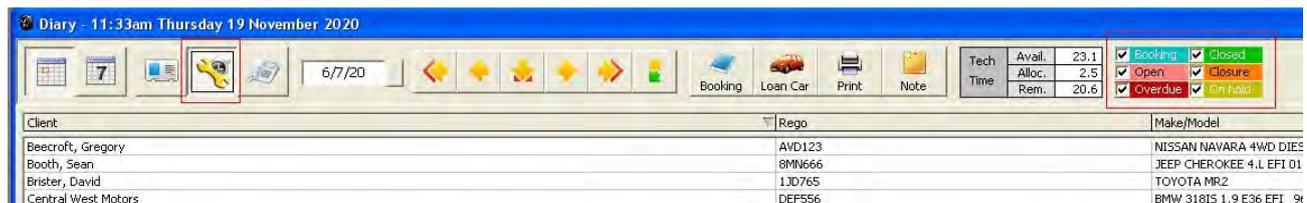
Employee Number, Sequential

Upon creating a new employee, the employee number field will be automatically filled with the highest previously recorded number + 1.



Diary Tech Time Filters

The diary filters for job types are now included on the tech time view.



Diary, Moving Bookings & Time Allocations

When moving a booking that has tech time allocated via the tech time view, the allocations will be automatically deleted if those allocations no longer fit into the new booking time frame.

Step 1: Go to tech time view on the diary and select a technician. Click and drag along a line to allocate that tech to a particular job.

Step 2: Double click on the allocated time area for that job – this will bring up the booking form. Change the dates.

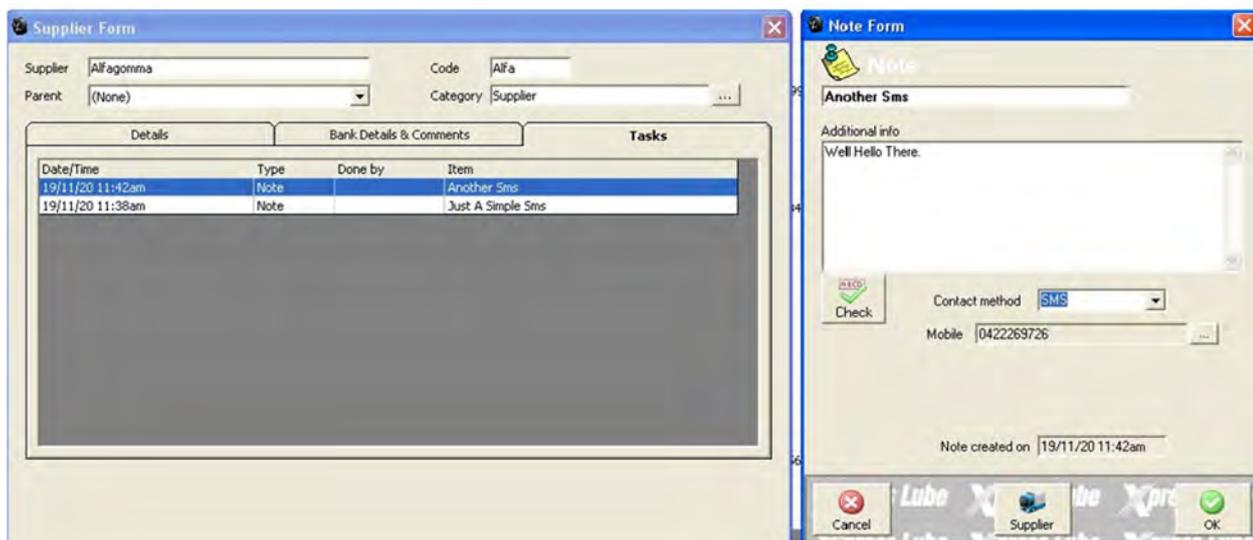
Step 3: The previously allocated tech time will be automatically deleted if the new booking time frame does not include the previous date where the time was allocated.

Supplier, SMS & Emailing

It is now possible to make Notes that send either SMS or emails to suppliers. A record will be kept of these communications. Essentially this functionality mimics what is available to clients.

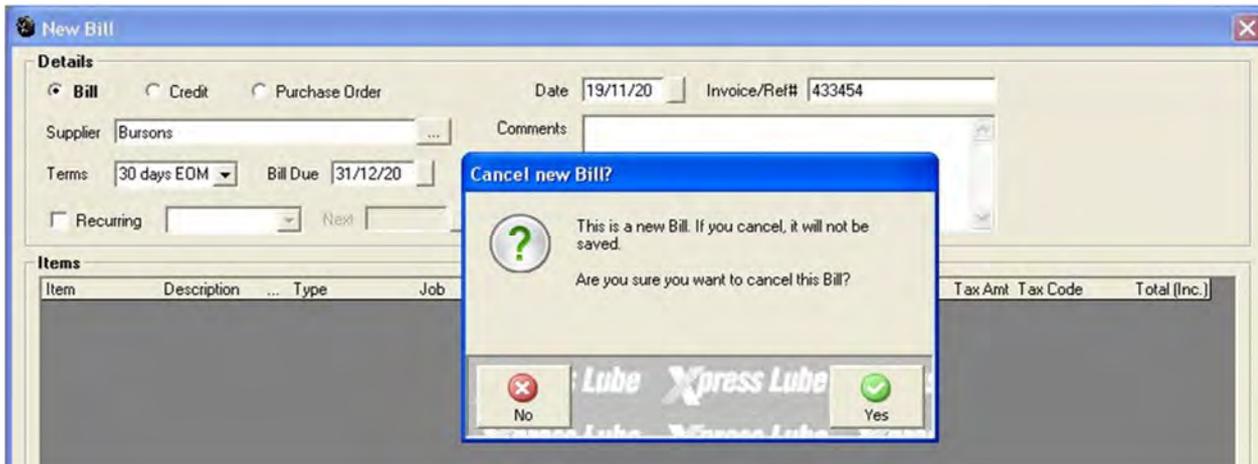
Step 1: Go to the supplier form for a particular supplier. Ensure they have a valid email address and mobile number (mobiles can be entered in Phone and/or Phone2 fields).

Step 2: Go to the Tasks tab, and click the new Note button. You can select any contact method including SMS or Email. Clicking OK will send the communications and save the record.



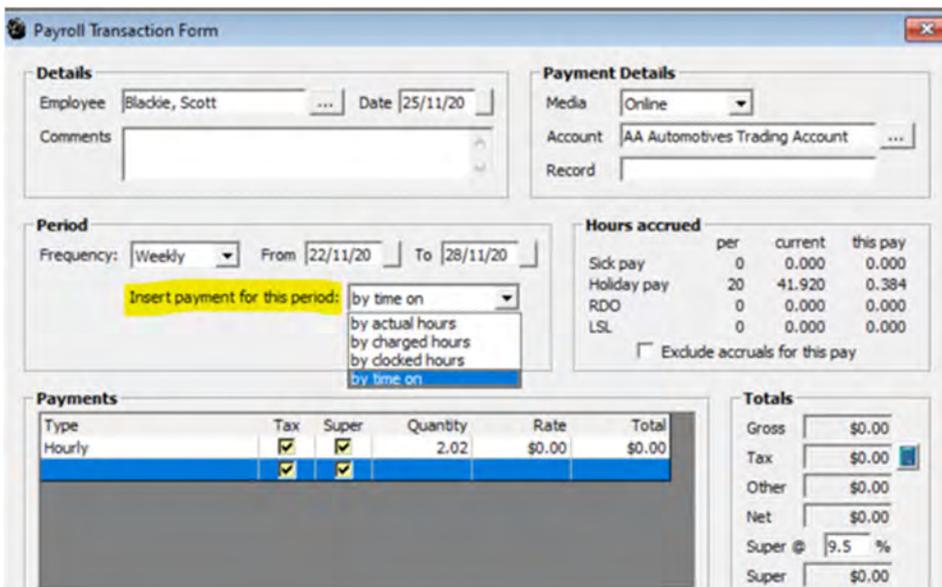
Purchasing

When adding or editing Bills, Credits and Purchase Orders, clicking the red cross button at the top right to close to window (or clicking the Cancel button in the bottom left) with unsaved changes will result in a warning to the user, requiring them to confirm if they want to cancel.



Payroll Transaction Form

In addition to being able to insert employee hours onto a payroll transaction by actual hours or charged hours in the period, there is a new option to use clocked or by time on hours for the period.



Note – this feature requires that there be clocked or time on hours for the employee in the specified payment period. The user will be informed if there is no record of hours for the date range.

This will add into the payments area a type of “Hourly” and the total hours based on the option selection with the totals automatically inserted in the payments area of the form.

The Time On option has also been enabled for non-technicians.

Online Job Card, Record Sort

It is possible to change the ordering of the open jobs displayed, either by Start date/time or Finish date/time, by selecting the desired option

Search: Jobs to show: Sort by: Service advisor:

Loan Cars, Additional

Additional loan cars beyond the first can now be allocated to the same client.

Deposits, Memo Field

It is now possible to alter the memo fields of deposits, even if that deposit has been reconciled, as long as none of the values are changed.

Bill Payment Form

Bills displayed on bill payments are ordered first by date, then by invoice number

Bills to show

All Due date

Bills to pay

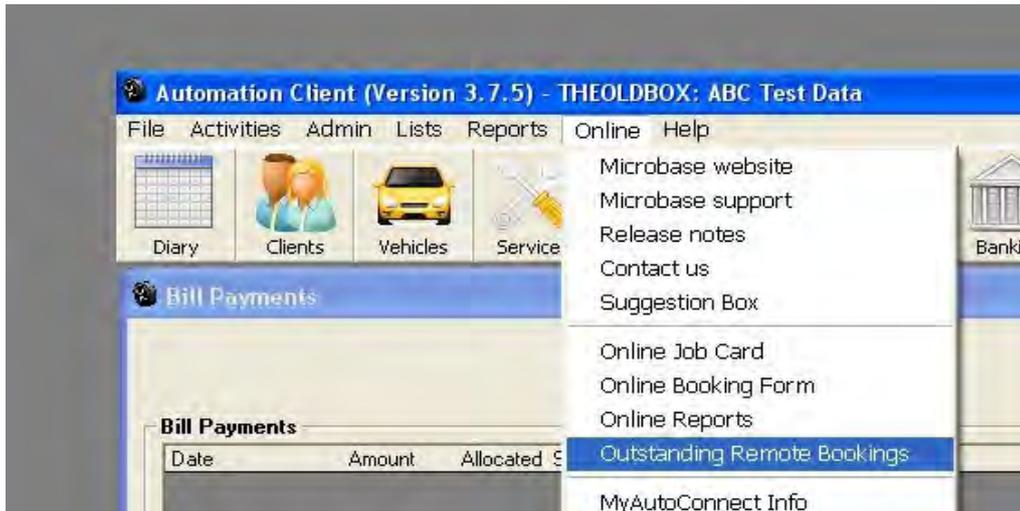
Inv Date	Inv/Ref#	Supplier	Due Date	Value	Paid	Balance	Payment
17/8/20	109810	Audi Centre Perth	30/9/20	\$110.10	\$0.00	\$110.10	<input type="checkbox"/>
14/8/20	109820	Audi Centre Perth	30/9/20	\$10.29	\$0.00	\$10.29	<input type="checkbox"/>
12/8/20	109717	Audi Centre Perth	30/9/20	\$33.18	\$0.00	\$33.18	<input type="checkbox"/>
11/8/20	109556	Audi Centre Perth	30/9/20	\$4,204.87	\$0.00	\$4,204.87	<input type="checkbox"/>
3/8/20	109385	Audi Centre Perth	30/9/20	\$1,060.06	\$0.00	\$1,060.06	<input type="checkbox"/>
31/7/20	109346	Audi Centre Perth	31/8/20	\$164.00	\$0.00	\$164.00	<input type="checkbox"/>
30/7/20	109362	Audi Centre Perth	31/8/20	\$84.79	\$0.00	\$84.79	<input type="checkbox"/>
21/7/20	109120	Audi Centre Perth	31/8/20	\$264.00	\$0.00	\$264.00	<input type="checkbox"/>
20/7/20	108988	Audi Centre Perth	31/8/20	\$158.91	\$0.00	\$158.91	<input type="checkbox"/>
17/7/20	CM108809	Audi Centre Perth	31/8/20	-\$402.10	\$0.00	-\$402.10	<input type="checkbox"/>
17/7/20	109022	Audi Centre Perth	31/8/20	\$185.72	\$0.00	\$185.72	<input type="checkbox"/>
17/7/20	109013	Audi Centre Perth	31/8/20	\$130.32	\$0.00	\$130.32	<input type="checkbox"/>
16/7/20	108989	Audi Centre Perth	31/8/20	\$1,051.61	\$0.00	\$1,051.61	<input type="checkbox"/>
16/7/20	108973	Audi Centre Perth	31/8/20	\$29.35	\$0.00	\$29.35	<input type="checkbox"/>
14/7/20	108754	Audi Centre Perth	31/8/20	\$1,328.42	\$0.00	\$1,328.42	<input type="checkbox"/>
14/7/20	108740	Audi Centre Perth	31/8/20	\$277.94	\$0.00	\$277.94	<input type="checkbox"/>

Allocated \$0.00 Remainder \$0.00 Find reference: >> Select All Clear

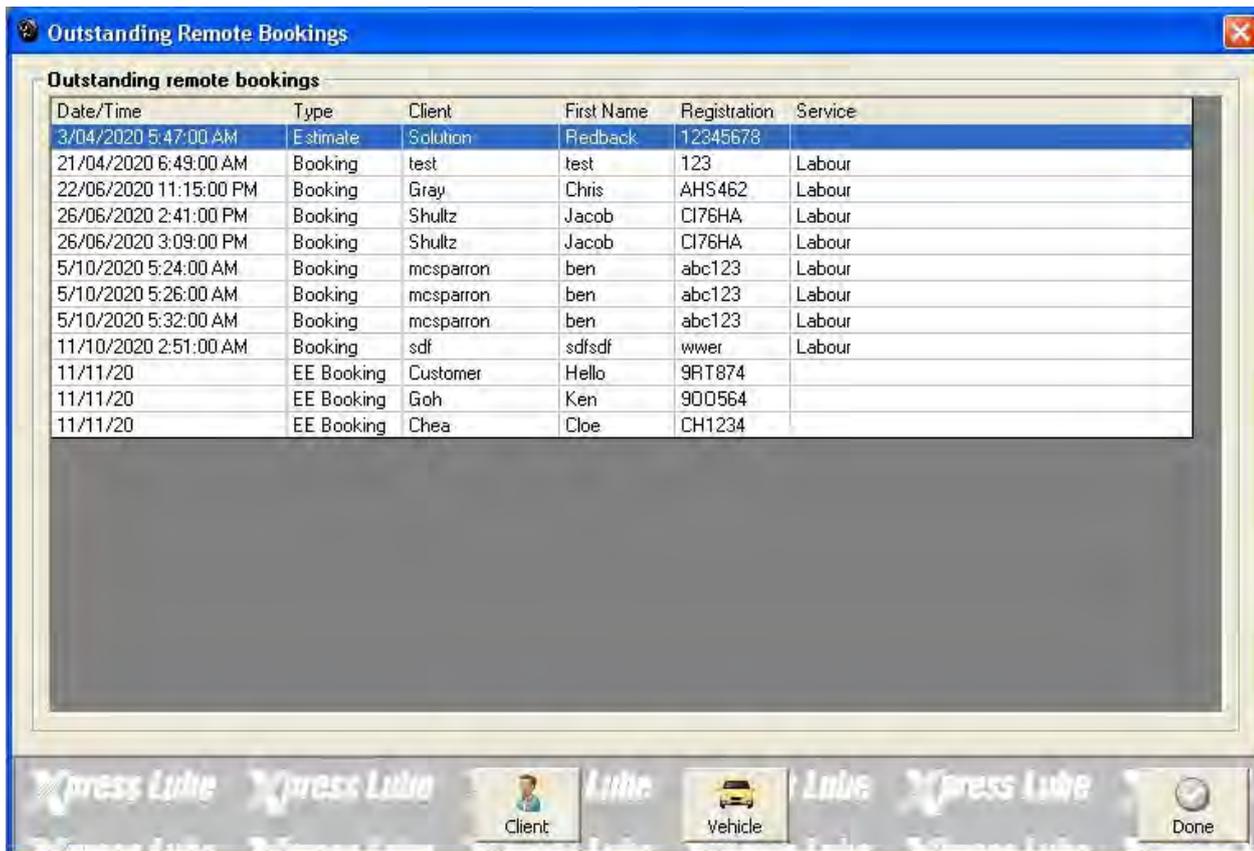
Remote Bookings, Log Access

It is now possible to view any outstanding remote bookings made either via a website booking form, or by enhanced emails.

Step 1: Go to the Online menu and select the new option “Outstanding Remote Bookings”.

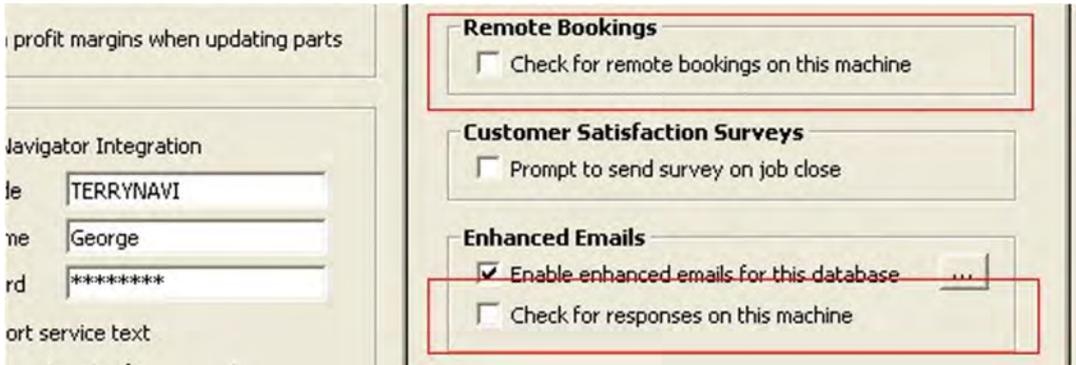


Step 2: Review any outstanding bookings:



It is possible to highlight an entry and click either the Client or Vehicle buttons to go to the corresponding Client or Vehicle record that matches the item.

Note – In order to process these online bookings, ensure that you have a machine on your network with the appropriate options checked in online settings:



Inventory Reporting Locations

All inventory reports that offer category filters now include the location of the parts (next to the category) on the report. This affects the following reports:

- Inventory Valuation
- Inventory Stock Status
- Reorder Report
- Item Detail
- Stock Movement
- Stock Movement by Source
- Inventory Over Stock

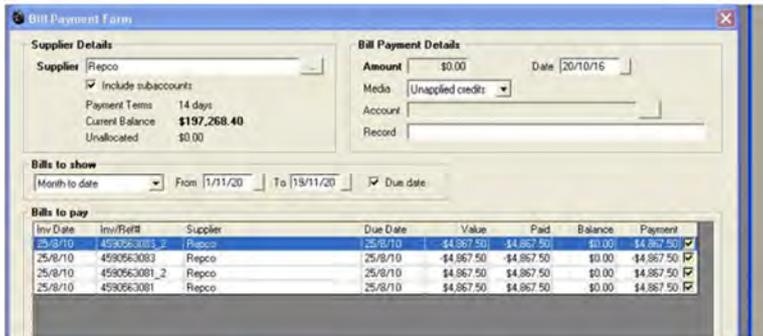
Inventory Valuation

19/11/2020

Category	Item	Description	On Hand	A
	52960BL	Fuse-maxi Blade 60amp	1.00	
AUTOMOTIVE ELECTRICAL - GLOBES & FUSES		[BAR ROTA 0213]	6.00	
	53430BL	Fusible Link-mini Female 30amp	2.00	
			2.00	
AUTOMOTIVE ELECTRICAL - GLOBES & FUSES		[BAR ROTA 0214]		
	53640BL	Fusible Link-female Mini 40amp	1.00	
			1.00	
AUTOMOTIVE ELECTRICAL - GLOBES & FUSES		[BAR ROTA 0217]		
	54405BL	Holder-fuse Inline W/proof Bpk	1.00	
			1.00	
AUTOMOTIVE ELECTRICAL - GLOBES & FUSES		[BAR ROTA 0222]		
	53080BL	Fusible Link-female 80amp	1.00	
			1.00	

Bill Payments, Remittance Advice

Remittance advice includes mention of parent account, if any:



Journals

Journal entries now utilise the default tax code specified in Settings / Accounts tab. This will automatically place the tax code onto any new line items added onto a journal, with the tax amount auto-calculating once a debit/credit value is entered.



Client List, Mobile #2

The Client List now has the Mobile 2 (if any) shown

Client/Company	First Name	Account No	Home Phone	Work Phone	Mobile	Mobile 2	Addr
Beecroft [@]	Dave	C7	(0427) 994559		0422269726	3214324234	The fir
Belmont salvage yard		19		(08) 94594448	0555555555	0222222222	32 aus
Belmont salvage yard - Booth	Sean	12	(08) 94514034				9 Fern

Reporting, Employee Time On/Off

A new report is available. Go to Reports menu -> Payroll reports -> Employee Time On/Off. Choose all or selective employees and the date range, the report will detail all of the time on/off for the period.

AA Automotives
Employee Time On/Off

24/11/2020

For the period 01/11/20 to 24/11/20.

Employee	Time On	Time Off	Hours
Blackie, Scott	24/11/20 9:34am	24/11/20 11:35am	2.02
	Total Hours		2.02
Johnson, Jayne	9/11/20 10:37am	9/11/20 1:01pm	2.40
	24/11/20 8:00am	24/11/20 11:30am	3.50
	Total Hours		5.90
Kev, W	24/11/20 8:49am	24/11/20 11:49am	3.00
	Total Hours		3.00

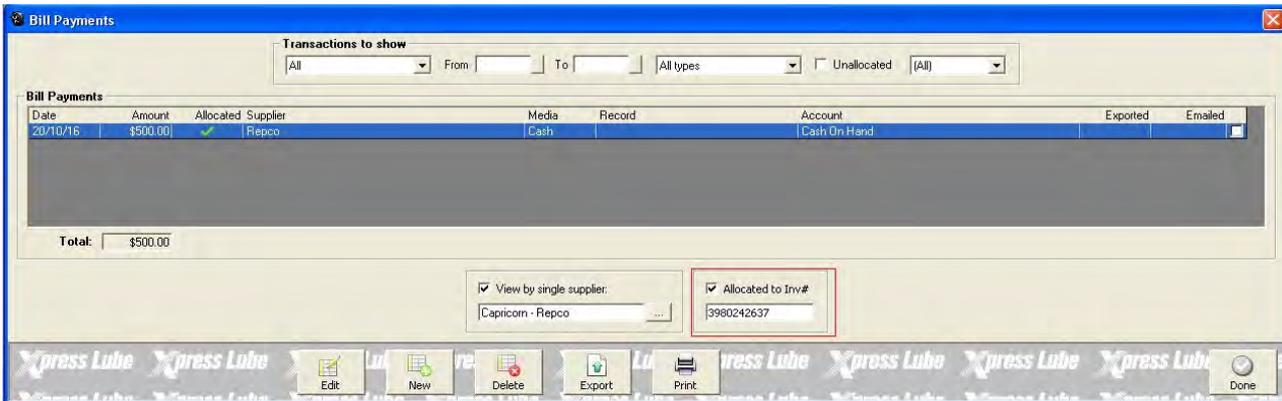
Bill Payments – locating and printing

In purchasing it is possible to locate all bill payments made for a particular bill and print out a list of those payments.

Step 1: Go to Purchasing, then highlight the bill you want to locate payments for and click the Locate button.



Step 2: This will take you to the Bill Payments form. All necessary filters will automatically be filled in for you, including the new “Allocated to Inv#” filter. This will therefore now be displaying all bill payments made for the selected bill:



You can choose to print the list of displayed bill payments at any time and a printout matching the display will be provided.

ABC Test Data
Bill Payment List
 19/11/2020
 No date restriction. Supplier: Capricorn - Repco. Allocated to Inv: 3980242637.

Date	Amount	Alloc.	Supplier	Media	Record	Account
20/10/16	\$500.00	✓	Repco	Cash		Cash On Hand
Total	\$500.00					