

Automation Premium Release Notes Version 3.7.9

Overview: Version 3.7.9 introduces new functionality to Emailing, parts catalogue importing, Navigator and Capricorn master supplier selection. This version allows for the sending of emails via the Microbase.com.au server, there is a new parts import option that allows for the importing of Ironman parts. Automation is now pathed to access the Repco Navigator API V2 that automatically assigns on connection the vehicle registration number entered to the search field in Navigator. There is also a change to the Capricorn master account selection, to fully understand how the upgrades will affect your business please ensure you read the notes below.

Emailing: V 3.7.9 introduces the ability to send emails via the Microbase server, please note this is a chargeable service, attracting a fee of \$5 per month, chargeable only when the service is utilised. We strongly suggest that you use your current ISP to dispatch outgoing mail as there are no additional charges for this service. The Microbase option should only be selected if you are having difficulty in obtaining the correct outgoing mail settings from your internet service provider.

Email, Microbase Server Setup: Select File \ Site Settings \ Online > Mail (SMTP) Server, you will see a Microbase option, select the checkbox, agree to the terms and conditions for using our server, your previous mail settings will grey out and are no longer able to be edited. Deselecting the option will allow for the SMTP settings to be entered, if correct then outgoing email will simply be handled by your internet service provider.

The screenshot shows the 'Settings' window with three tabs: 'Site Details', 'Database settings', and 'Accounts'. The 'Mail (SMTP) Server' section is expanded, showing a 'Microbase' checkbox which is checked. Below it, the 'SMTP Server' settings are visible: Host (smtp.mail.com), Port (587), Connection (STARTTLS), Authentication (LOGIN), Username (microbase_australasia@mail.com), and Password (masked). To the right, the 'Repco' tab is selected under 'Database settings', showing 'Repco Supplier' (Capricorn - Repco), 'Repco Invoice Retrieval' (Enable for this database, GLN, Check for Repco Invoices on this machine, Maintain profit margins when updating parts), and 'Navigator' (Enable Navigator Integration, Site code: TERRYNAPI, Username: Ross, Password: masked, Import service text, Use quote price for new parts). At the bottom, there are icons for Dynamic, Node, MyAC, and Openpay.

Note: We strongly suggest you only use this option if all attempts at using the settings provided by your current ISP fail.

Parts Import, Ironman: The latest version allows for the importation of parts catalogues distributed by Ironman via the parts and inventory utility. To import, save the Ironman catalogue Excel file to a folder that is accessible to Automation, select Activities \ Parts & Inventory Utility > Special Parts Import, select the down arrow to the right of the selection field, point and double click on the Ironman option, select process.

Navigate to the folder containing the Ironman file, point and double click, the import process will now initiate. Once complete a finalisation message is displayed.

The screenshot shows three sections of the software interface. The first section, 'Inventory min/max values', has two radio buttons: 'Set to values:' (selected) with input fields for 'Min:' and 'Max:', and 'Calculate based on sales data:' with a dropdown menu. A 'Set values' button is to the right. The second section, 'Parts Update', has three buttons: 'Export', 'Import', and 'Download'. To the right are two checkboxes: 'Update barcodes only' and 'Update locations only'. The third section, 'Special Parts Import', has a dropdown menu with 'Ironman import' selected and a 'Process' button to its right.

Note: Before importing the catalogue, it is important that you are familiar with the changes that occur in relation to this supplier's parts:

1. Cost & standard pricing (inc GST) will be imported from the catalogue
2. The cost price is calculated from the distributor price column + GST
3. Categories, a new category titled Ironman is created and all imported parts are assigned to Ironman
4. A new income account titled Ironman is created as a sub account of parts, all Ironman parts are pathed to this income account.
5. A new COGS account titled Ironman is created, all Ironman parts are pathed to this account.

Please ensure that the above rules are acceptable to your operation prior to initialising the import as once performed there is no function that allows for a reversal.

Navigator, Vehicle Registration: The latest version of Automation is pathed to access the V2 Repco API that allows for the automatic inserting of the registration number and state recorded on the vehicle form directly into the Navigator search field.

Add Registration and State to Vehicle Form When Booking

The screenshot shows the 'Vehicle Form' window. The 'Registration' field is populated with 'S433AYB' and the 'Reg. state' field is populated with 'SA'. Red arrows point to these fields. Other fields like 'Odometer', 'Engine hrs', and 'Inactive' are also visible.

Select Navigator from Job card

The screenshot shows the 'Job card' window. The 'Navigator' button is selected in the top navigation bar. A red arrow points to the Navigator button.

The screenshot shows the 'Navigator' search field. The registration number 'S433AYB' and state 'SA' are populated. A red arrow points to the search field.

Navigator will self populate Registration Fields

The new feature allows for only single entry of the registration and state, no further need to duplicate what has already been entered into Automation.

Capricorn, Selecting A Parent Supplier: Previous versions of Automation relied on identifying the master Capricorn supplier from the supplier listing by recognising the word Capricorn, this method works well when there is only one entry. Some sites have multiple Capricorn suppliers in their list, this duplication has caused issues for some locations so we have introduced a manual selection method available from site settings.

The screenshot shows the 'Site Settings' window with the 'Database settings' tab selected. The 'Capricorn Supplier' field is highlighted. The 'Select a Supplier' window is open, showing a list of suppliers. The 'Capricorn Supplier' is highlighted in the list.

Category	Code	Supplier	Addr	Phone	Phone2	Fax	Orders	Contractor	Balance
Amp		Amp	123 High Street Parramatta NSW	9693 6547		9674 9665			\$0.00
Alto		Alto	23 Liability Street Carberra ACT	130022233		1300222563			\$0.00
Budg		Budget Auto Parts	123 High Street Fremantle WA	9438 9955		9438 6655			\$3,138.98
Call		Callen Lubricants	35 Bracka Street Fremantle WA	9335 6666		9335 6598			\$0.00
Capr		Capricorn	123 Burwood Road Burwood WA	9496 1111		9496 2222			\$5.59
Esan		Esanda Finance	123 St Kilda Road St Kilda VIC	039656 9656		039656 9988			\$0.00
Ht T		Ht Tech Brake & Clutch	23 Wanneroo Road Wangara WA	9456 9898		9456 8754			\$0.00
Stat		State Energy Commission	123 Bright Street Fremantle WA	9563 9999		9563 8888			\$8.62
Tk E		Tk Engine Reconditioners	23 Gowrey Street Kewdale WA	9564 2323		956 2121			\$0.00
Top		Top Notch Auto	23 Blake Street Malaga WA 6090	9754 5656		9754 2323			\$0.00
Wa R		Wa Rag Supplies	123 Glenforrest Way Cannington	9451 2323		9451 2525			\$0.00
Wa T		Wa Transmissions	23 Harry Street Osborne Park WA	9456 2233		9456 8877			\$0.00

Go to File \ Site Settings \ Database Settings > Capricorn Supplier, select the button to the right of the Capricorn Supplier field, your supplier listing displays, highlight the master Capricorn account, click OK (F12) finalise the selection by selecting OK (F12) from the site settings form.

Note: If you are using the auto reconciliation feature to pay your Capricorn suppliers you will need to select the correct supplier prior to importing your Capricorn purchases.