

Automation Premium Release V3.8.4

Table of Contents

Overview	2
Job Card	2
Text Colouration	2
Header Records	2
Job Card Online	2
Purchasing.....	3
Duplicate Parts On Orders	3
Part Locations.....	3
Keyword Search.....	3
Diary	4
Time Cells	4
Booking Deletions	4
Service Adviser Display	4
Booking Confirmation SMS	5
Setup	5
Booking Confirmation, Sending.....	6
Vehicle Form	6
Transmission #.....	6
Sales Screen.....	6
Email Sent	6
Value Search.....	6
Inventory.....	7
Alternate Parts Recording.....	7
Selecting An Alternate Part.....	8
Reports.....	8
Supplier Aging Summary.....	8
Bank Reconciliation	9
Additional Sort Options	9
Client & Supplier Form.....	9
Address Auto Lookup.....	9
STP Phase 2	10
Salary Sacrifice Superannuation	10

Release Notes – Automation Premium Version 3.8.4

Overview

Over the past few months, we have been working of delivering some exciting new enhancements to Automation Premium, our team is pleased to deliver the results of this work in version 3.8.4. The new code incudes improvements to purchasing, the ability to nominate unlimited alternate parts to inventory items, sort diary records by service adviser, greater flexibility when reconciling, ability to send an SMS when a booking is created plus automated address look up and much more. Please take the time to read the release notes so you can make the most of the new features in Version 3.8.4.

Job Card

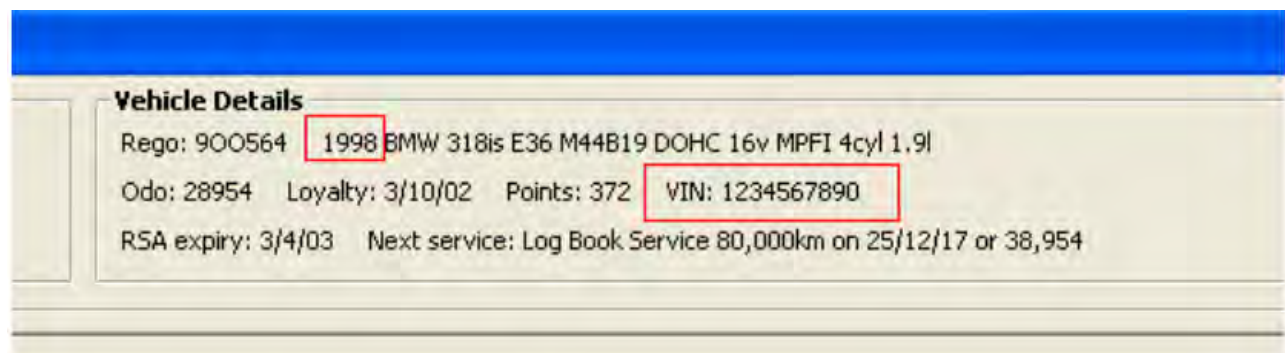
Text Colouration

This version allows the user to select red, green and blue to highlight text in the work done and vehicle report fields. Simply select the text you wish to highlight, right hand mouse click and from the drop-down menu select the colour and or format you wish.



Header Records

Now include the year of manufacture and the VIN #



Job Card Online

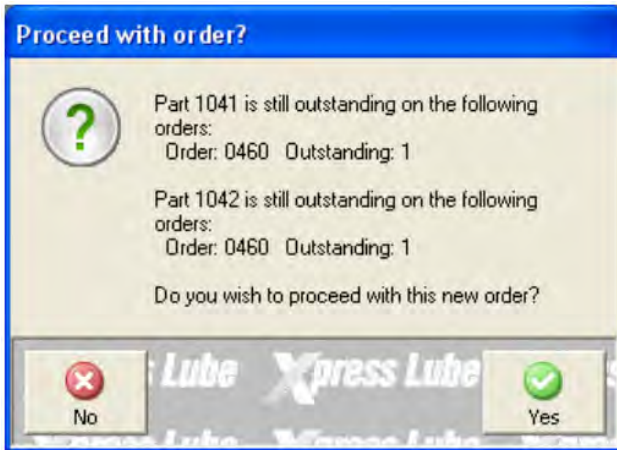
Version 3.8.4 gives you the ability allocate log technicians on / off of non-chargeable jobs.

Select a technician by clicking on a row to highlight it. Change the option button to “non-chargeable” and select the type of N/C item from the list. Then click OK and you will have clocked on/off from the non-chargeable job

Purchasing

Duplicate Parts On Orders

To prevent duplication of parts on order, if there are existing POs with parts outstanding, upon entering a new PO with the same parts, Automation informs the user those parts have already been ordered. A message screen will provide the following information.



You are presented with the option to cancel the order (no) or proceed with the transaction (yes).

Part Locations

A new location parts location column has been added to the purchasing forms bills, credits and purchase orders.

Item	Description	Type	Job	Service	Location
00007841	Secodhand Gearbox	Buy-In	<input checked="" type="checkbox"/> 34033	Labour	
000135669	Exchange Secondhand Engine	Buy-In	<input checked="" type="checkbox"/> 34033	Labour	
0000647	Second Hand Fuel Flap	Inventory	<input type="checkbox"/>		Wall 1

Keyword Search

located at the bottom of the purchasing screen is a new keyword search function, enter the alpha or numeric you are searching for in the displayed records, click in the checkbox above the comment keyword field and your cursor on finding a match will highlight the entry. **Note:** The entry can be anywhere in the comments text string.

Date	Inv/Ref#	Supplier	Due Date	Total (Inc.)	Paid	Balance	Comments
10/10/22	98745	Aom Perth Pty Ltd	30/11/22	\$38.87	\$0.00	\$38.87	Copied From Purchase Order 577460007
10/10/22	123546	Aom Perth Pty Ltd	30/11/22	\$227.44	\$0.00	\$227.44	Copied From Purchase Order 577460007

Total: \$266.31 \$0.00 \$266.31

View by supplier: Include sub-accounts View Invoice Number: Comment keyword: 577460007

Diary

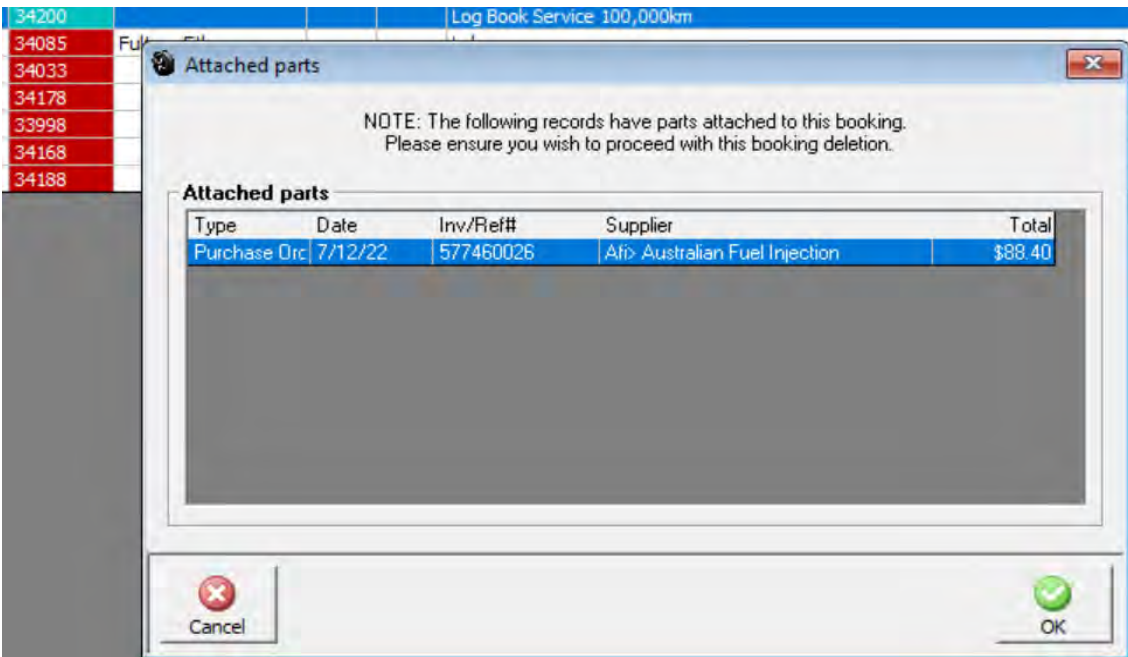
Time Cells

The time cells on the diary screen have been extended to include 10pm – 12pm time slots

5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	Hours
																			0
																			0
																			0
																			0

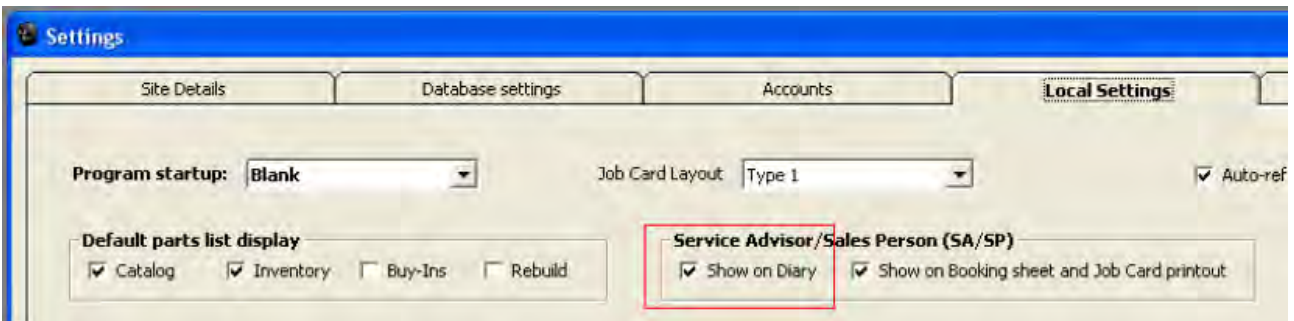
Booking Deletions

If a booking has been entered and parts have been attached or a purchase order has been raised on deletion Automation will display a message with details of the allocated parts and transaction type ie: Bill or PO, if you wish to proceed with the deletion select OK (F12) to retain the booking select Cancel (ESC).



Service Adviser Display

If you wish to view and sort by service adviser from the diary screen you will need to trigger the option from File/ Site Settings / Local Settings > Service Adviser / Sales Person



Save your selection with OK (F12) once you refresh your diary you will see a new SA/SP column plus an additional search field located on the top right-hand side of the diary screen.

Tech Time	Avail.	78	<input checked="" type="checkbox"/> Booking	<input checked="" type="checkbox"/> Closed	<input checked="" type="checkbox"/> Loan/avail	Service advisor: All
	Alloc.	0	<input checked="" type="checkbox"/> Open	<input checked="" type="checkbox"/> Closure	<input checked="" type="checkbox"/> Loan/alloc	
	Rem.	78	<input checked="" type="checkbox"/> Overdue	<input checked="" type="checkbox"/> On hold	<input checked="" type="checkbox"/> Loan/over	
Job#	SA/SP	Col.	Note	Service		
1000014	Jayne Johnson			Log Book Service 50,000 Km		
1000017	Blah			Log Book Service 110,000km		
1000030				1,000km Inspection Service		
1000031	Angelfiftyeight, Angie			Log Book Service 110,000km		
1000032				Log Book Service 70,000km		
1000034				Log Book Service 100,000km		
1000035				Log Book Service 80,000km		
1000043				1,000km Inspection Service		
1000056	Smith, Fred			Log Book Service 60,000km		
1000007	Jayne Johnson			Log Book Service 20,000km		

To change the SA / SP assigned to a job go to either the booking form or job card.

Booking Confirmation SMS

This new feature allows you to compose a SMS message that can be sent when a booking is entered onto the diary screen. In the following notes we give you a sample message, however you can compose your own if this format doesn't suit your requirements.

Setup

Open File / Site Settings / Online > SMS, select the booking SMS option, move over to the button at the end of the selection field, on selection you will see your saved SMS list, select new from the bottom of the display and compose your message. We suggest you title the communication Booking Confirmation.

SMS Details

Title: Booking Confirmation

Message: Hi <!--clientfirstname--> Your Booking For <!--servicedue--> on vehicle <!--VehicleRegistration--> Has Been Confirmed For <!--servicedate--> |

Check 

Characters: 145 Messages: 1

Note - this message may change size when the merge fields are resolved.

Add field...

Cancel  OK 

Your customer would receive:

Hi John Your Booking For A Major Service on vehicle XYZ 123 Has been Confirmed For 8/12/2022 8.00am

Note: the trigger to send the start time is the servicedate field.

Booking Confirmation, Sending

When the booking confirmation option is selected from site settings as you save the booking to the diary you will be prompted to send the message, the message screen is the same as the SMS details, you can edit the message if you choose or simply select cancel to not send to the client.

Vehicle Form

Transmission

A new transmission # field has been added to the vehicle form

The image shows a screenshot of a vehicle form with the following fields:

- VIN No. (text input): KMHLB814MCU010527
- Tyre Size (front) (text input)
- Engine Cap. (text input)
- Engine No. (text input)
- Tyre Size (rear) (text input)
- Seating Cap. (text input)
- Security (text input)
- Fuel Type (dropdown menu)
- Doors (text input)
- GVM (text input)
- Radio PIN (text input)
- Reference (text input)
- Cylinders (text input)
- Trans# (text input, highlighted in yellow)
- Build date (text input)
- First date (text input)

Sales Screen

Email Sent

There is a new column on the sales screen titled emailed, if the form the line item represents has been emailed to the client a green tick is displayed.

First Name	...	Value	Paid	Balance	Emailed	Print
		\$230.00	\$0.00	\$230.00	✓	<input type="checkbox"/>
		\$229.80	\$0.00	\$229.80		<input type="checkbox"/>
Sean		\$75.00	\$0.00	\$75.00		<input type="checkbox"/>
Robert		\$285.00	\$0.00	\$285.00		<input type="checkbox"/>
		\$0.00	\$0.00	\$0.00		<input type="checkbox"/>

Important note: The screen will only record a tick when emailing from this update onwards. It will not retrospectively detect if anything has been emailed in the past, resulting in all items initially appearing blank.

Value Search

To assist you in locating a transaction we have added a new view amount search option to the bottom of the sales screen. To use add the value you are looking for and select the checkbox located above the search field. Be aware that the search will only be applied to the displayed records.

The image shows a screenshot of the sales screen with the following search options:

- Work done keyword: [text input]
- View Order#: [text input]
- View amount: [text input, highlighted with a red box]

Inventory

Alternate Parts Recording

Version 3.8.4 allows for the addition of multiple alternate parts, to add these to the part form firstly the item must be flagged as inventory. On opening the part form you will see toward the bottom of the display an alternate parts option, to the right of this is a selection button, clicking on this option will open your parts listing.

On Hand Min. Stock
Total Value Max. Stock
Avg Value Allocated
 On Order
Purchase Units
Alternative parts ...
Preferred supplier ...

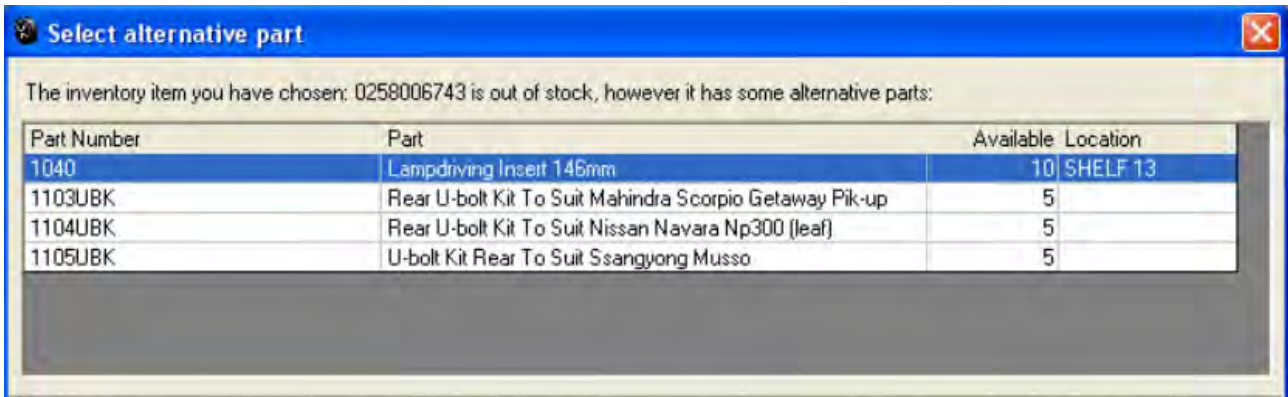
The displayed listing has checkboxes located to the right of the record, to add an alternate simply highlight the entry and mouse click you will see a tick now appears against your selections.

1.00	-1.00	\$754.00	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	-1.00	\$594.00	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	10.00	\$4.39	\$0.00	\$0.00	\$0.00	<input checked="" type="checkbox"/>
0.00	-2.00	\$4.39	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
1.00	-2.00	\$4.39	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	-1.00	\$165.00	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
1.00	2.00	\$66.99	\$0.00	\$0.00	\$69.99	<input type="checkbox"/>
0.00	0.00	\$7.49	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	0.00	\$78.41	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	0.00	\$78.41	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	0.00	\$69.29	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	1.00	\$20.00	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	0.00	\$658.00	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	1.00	\$54.54	\$0.00	\$0.00	\$62.99 SHELF 36	<input type="checkbox"/>
0.00	0.00	\$39.20	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	0.00	\$39.20	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	0.00	\$39.20	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	5.00	\$39.20	\$0.00	\$0.00	\$0.00	<input checked="" type="checkbox"/>
0.00	5.00	\$39.20	\$0.00	\$0.00	\$0.00	<input checked="" type="checkbox"/>
0.00	5.00	\$39.20	\$0.00	\$0.00	\$0.00	<input checked="" type="checkbox"/>
0.00	0.00	\$39.20	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
0.00	0.00	\$65.34	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>

You can choose as many alternates as you wish, select OK (F12) and you will see your alternate parts have now populated the dedicated field. Close the part form with OK (F12) to finalise.

Selecting An Alternate Part

When applying a part with alternates to a job card or invoice if the part has zero stock then a list of alternates is displayed including the quantities on hand and location, alternates with zero quantities are excluded from the list.



To apply an alternate part, highlight from the list and double mouse click.

Reports

Supplier Aging Summary

The Supplier aging summary report has been designed to give you the option of viewing sub accounts individually or consolidating the individual totals into one value. For this to be of assistance you need to have supplier records that contain a parent and sub account ie: Capricorn.

ABC Test Data
Supplier Aging Summary
6/12/2022
As of 6/12/22

Summarised version

Supplier	Current	30+	60+	90+	Balance	Total
Capricorn	\$0.00	\$220.01	\$0.00	\$197,081.82	\$0.00	\$197,301.83
Hi Tech Brake & Clutch	\$594.09	\$0.00	\$0.00	\$88.21	\$0.00	\$682.30
Totals:	\$594.09	\$220.01	\$0.00	\$197,170.03	\$0.00	\$197,984.13

ABC Test Data
Supplier Aging Summary
6/12/2022
As of 6/12/22

Regular version

Supplier	Current	30+	60+	90+	Balance	Total
Capricorn - Cleanaway	\$0.00	\$220.01	\$0.00	\$10.89	\$0.00	\$230.90
Capricorn - Microbase	\$0.00	\$0.00	\$0.00	\$101.15	\$0.00	\$101.15
Capricorn - Repco	\$0.00	\$0.00	\$0.00	\$196,969.78	\$0.00	\$196,969.78
Hi Tech Brake & Clutch	\$594.09	\$0.00	\$0.00	\$88.21	\$0.00	\$682.30
Totals	\$594.09	\$220.01	\$0.00	\$197,170.03	\$0.00	\$197,984.13

Bank Reconciliation

Additional Sort Options

It is now possible to sort Date, Debit and Credit values in ascending / descending order, clicking in the header cell of either of these columns will allow you to sort via that value or date either ascending or descending.

Date	Type	Reference	Memo	Account	Debit	Credit
1/8/22	Bill Payment	1/8/22		Robinson Famil Trust	\$4,895.00	\$0.00
4/8/22	Transfer			Bank online saver	\$3,000.00	\$0.00
4/8/22	Transfer			Visa card - Graham	\$3,000.00	\$0.00
10/8/22	Transfer			Super contribution - Peter	\$1,800.00	\$0.00
2/8/22	Bill Payment			Wesfarmers Federation Insuranc	\$1,651.04	\$0.00
11/8/22	Transfer			Drawings- Graham	\$1,600.00	\$0.00
4/8/22	Transfer			Drawings- Graham	\$1,600.00	\$0.00
11/8/22	Transfer			Drawings - Peter	\$1,300.00	\$0.00
4/8/22	Transfer			Drawings - Peter	\$1,300.00	\$0.00
11/8/22	Payroll	11/8/22		Santaromita, Brady	\$1,149.12	\$0.00

Find reference: >> Find amount: >> Show: All Cleared: \$0.00 \$0.00

Client & Supplier Form

Address Auto Lookup

This version introduces the ability to search for the correct address details from both the client and supplier forms. To use this feature open the client form and in the address field enter as much or as little of the address as you wish then select the blue envelope option next to the Google maps icon, a matched list is displayed.

The screenshot shows the 'Client Form' for 'Anderson'. The 'Address' field contains '8 Mambutan Place'. A dropdown menu titled 'Matching addresses found' is open, showing three options:

- 8 RAMBUTAN CL, MANDORA QLD 4870
- 8 RAMBUTAN CT, GREENWITH SA 5125
- 8 RAMBUTAN PL, SOUTH LAKE WA 6164

The first option is highlighted in blue. Other fields include Title, First Name (Eldyth), Salutation (Eldyth), ABN, Ph (Work), Mobile (0422976295), Fax, and Email (eldythanderson@gmail.com). There are also checkboxes for 'Private', 'Business', 'Use Parent Address', 'Inactive', and 'Opt-out of all marketing'.

To enter the correct details, point and double click on the line item, the address fields will then self-populate.

Follow the same process for the supplier form.

STP Phase 2

Salary Sacrifice Superannuation

A note regarding STP reporting of additional employee superannuation payments.

Automation payroll has an option on the employee form that triggers an additional employee super contribution as salary sacrifice, if the flag is set to false then we assume the payment is simply an additional contribution that is not being allocated to salary sacrifice hence the value being added to the gross wage with income tax being payable at whatever bracket the tax payer is in. You can find the salary sacrifice option in the banking / super selection made from the employee form, if the employee is indeed salary sacrificing then please ensure this option is selected, the contribution will no longer be added to the gross and therefore not attract tax.

If the payment is meant to be salary sacrificed and the option is not selected the ATO allocate the payment incorrectly.