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Release Notes - Automation Premium Version 3.8.6

Overview

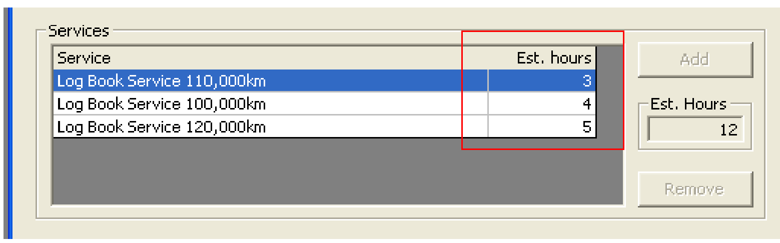
Version 3.8.6 introduces various new functions to the program encompassing changes to parts and purchasing management, checklists, services, payroll, employees clocked times and various additional fields are now available from many forms.

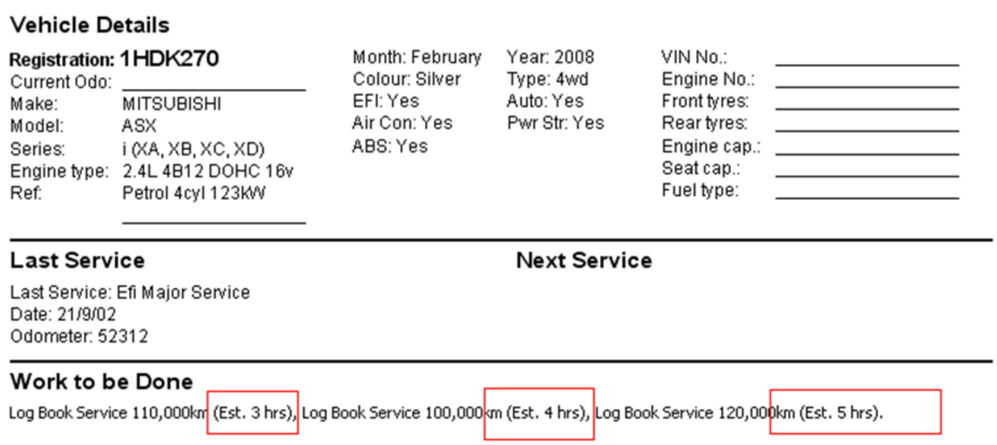
We strongly suggest you read through the notes to evaluate what changes you can implement to benefit your business.

Job Card (Printed)

Hours Estimated

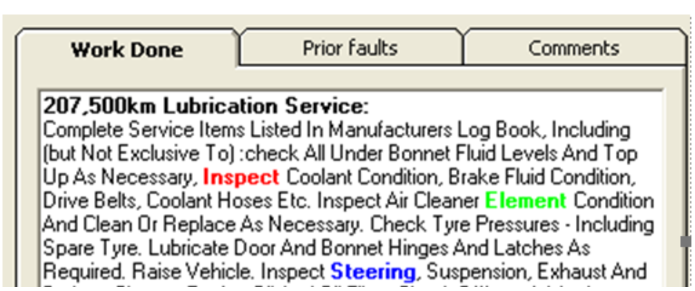
An estimated time entered against a service from the booking or service form will now automatically be printed on the job card in the work to be done text area.





Text Formating

Colours used to highlight text in the work to be done text box will now replicate between the booking sheet / job card and invoice.



Booking Sheet (Printed)

Vehicle Fields

The booking sheet now includes the drivers name and contact number recorded on the vehicle record, plus for quick reference we have included the rego check date.

Vehicle Details

Registration: 1HDK270	VIN No.:	Ref.: ....
Odometer: 52312	Eng. No.:	EFI: Yes CRD
Make/Model: MITSUBISHI ASX	Eng. Cap.:	Auto: Yes CVT
Series: i (XA, XB, XC, XD)	Seat. Cap.:	Air Con: Yes
Year: 2008 Month: February	Tyre Size:	Pwr Str: Yes
Type: 4wd Colour: Silver	GMV:	ABS: Yes
Fuel Type:	Doors:	EV: Yes Hybrid
Driver: Fred	Rego check: 1/3/24	DSG: No
Driver contact: 123456789		

Client Fields

Version 3.8.6 includes mobile 2 and email 2 records on the booking sheet

Booking Sheet **Job 1000060** Printed 5/08/2023

Client	Contact Details	Availability
Sean Booth	Ph. Home: (08) 94514034	Start: 16/12/22 8:00am
9 Fern Place	Ph. Work:	Finish: 16/12/22 5:00pm
Wilson WA 6107	Mobile: 0422269726	
	Mobile 2: 1231238123	
	Email: gt@microbase.com.au	
	Email 2: gt2@microbase.com.au	

Job Card (Display)

Checklist Incomplete

When closing a job card that has checklist attached if these have not been completed you will be presented with a warning message asking you whether you wish to continue or return to the job card to finalise.

Close job with incomplete checklists?

This job has some active checklists that are incomplete.

Do you still wish to close the job?

Vehicle Reference

The vehicle reference when recorded is displayed in the header of the job card

Vehicle Details

Rego: WLE821 2008 suzuki swift

Odo: 210365

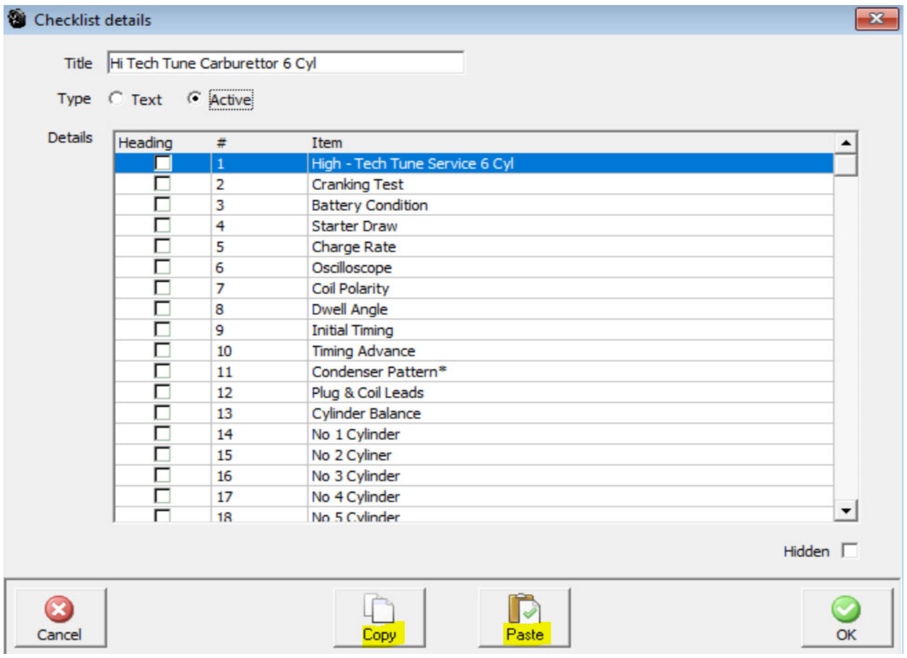
Reference: S1230

Checklists

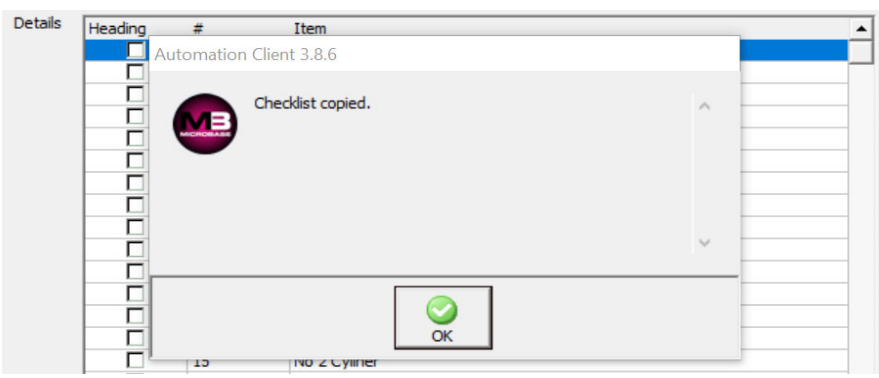
Copy checklists

If a checklist has been referenced elsewhere in the program and you wish to make a change to line item this is possible, however be aware that all previous jobs with the checklist attached will also be changed. DO NOT try to insert a line item into a previously used checklist as this action will result in checklists attached to previous jobs being deleted.

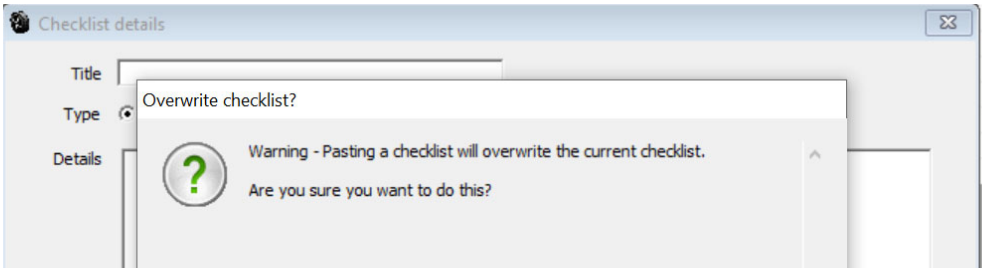
The new copy and paste option in version 3.8.6 will simplify the creation of new checklists by allowing you to copy a current list, edit and save under a new title.



Open the checklist from Lists / Checklists this takes you to the checklist details, at the bottom of the display you will see copy and paste options, select copy, a confirmation message is displayed, click on OK.



Close the checklist details form, next select NEW from the bottom of the checklists list when presented with a blank form click on the paste option, you will see a warning message, if you wish to proceed select OK.



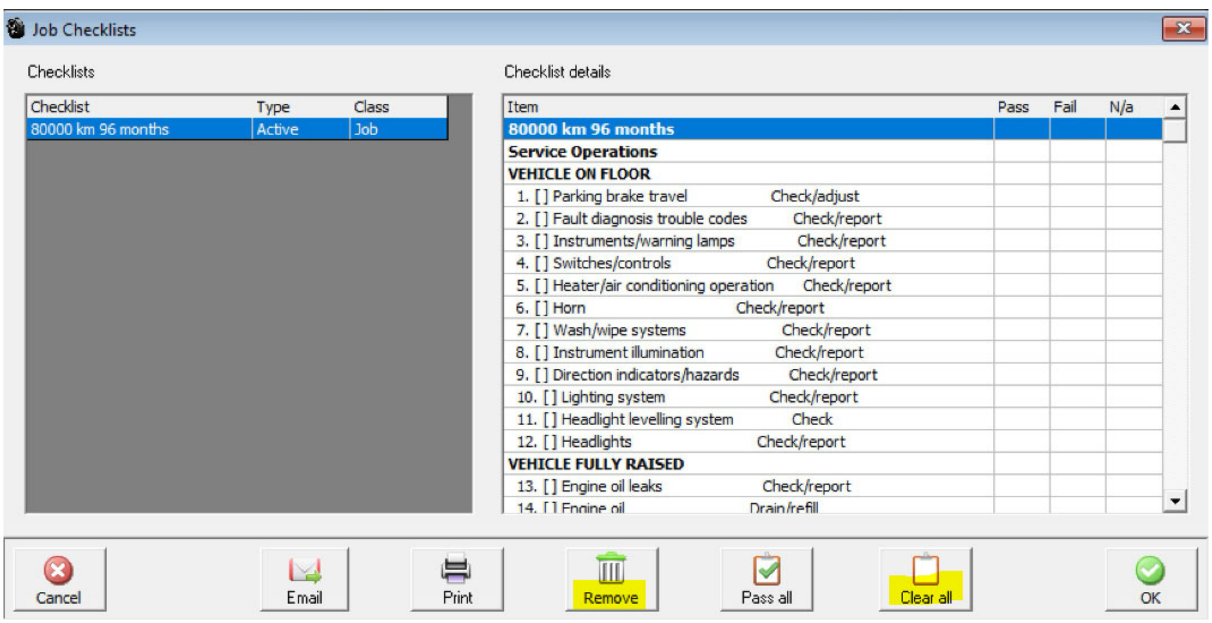
You will now see a copy of the original checklist, the checks can ce edited / added, the title field can also be changed. **Note:** To change the description you will need to convert an active list to text, edit the first line then revert back to active.

Navigator / Smart Inspector Checklists

You can remove active checklists attached by Navigator via Smart Inspector. When you look at job checklists, you can now see what 'class' each of them are. The class is either 'service' or 'job'.

A 'service' checklist is a checklist attached to a service that is part of that job. They can't be removed, as they are part of the service. You can of course go and remove them from the service record if you wish.

A 'job' checklist is one of the checklists attached specifically to that job from Navigator / Smart Inspector. They can be removedbyu highlighting the service title and selecting remove, the user is warned before proceeding with the removal. If you do remove the checklist and want to re-insert, the only way to get it back is to go back to Navigator / Smart Inspector and attach it once more.



Users can also 'clear all' if they want to clear all items (untick everything) in a checklist.

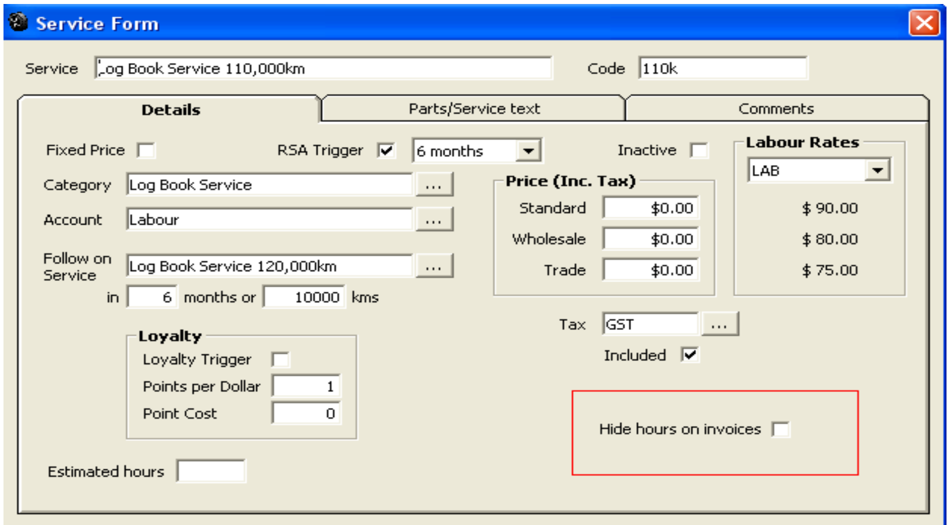
Services

Show / Hide Hours

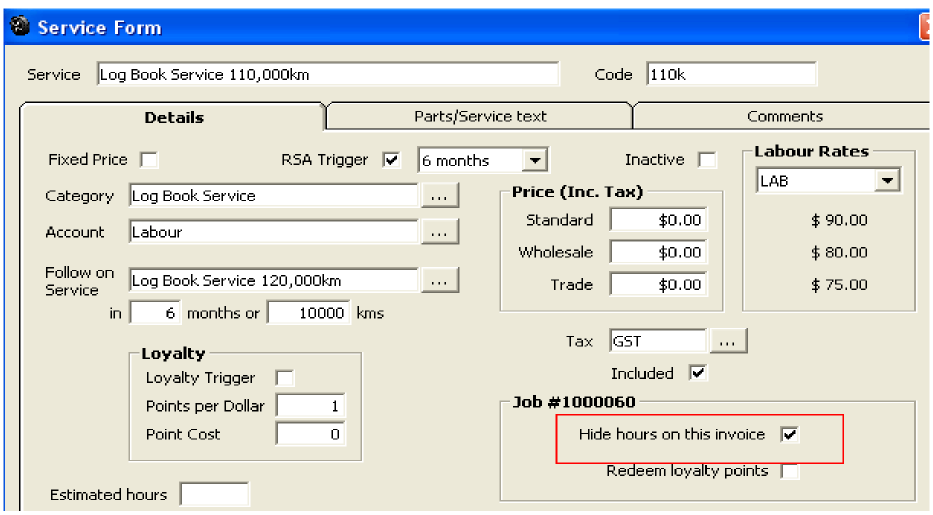
This version introduces the ability to flag individual services to show / hide hours permanently or as a “one off” when selected from the job card. The ability to set all services to show / hide hours in site settings /

database setting remains unchanged. However, you can set a service to disregard the default. Each service **when the form is opened from the service listing** has a new “hide hours on invoices” option.

In the example the default is show hours, if we wanted to hide the hours for this service on all subsequent jobs it is applied to we would need to select hide hours on invoices option, this will now become the default setting for this service.



Selecting a service from the job card allows you to hide / show the hours on this job ONLY as you can see in the example the selection is titles “Hide hours on this invoice”.



Payment Receipts

Invoice Allocations

The payment transaction form receipt printing report displays the invoice number/s the payment was actually allocated to.

Receipt

Client	Payment	
The Games Place 1236 Unit 1 Albany Highway Cannington WA 6107	**Date:**	1/8/23
	Amount:	$ 100.00
	Media:	Direct -
	Record:	
	Balance:	$ 849.45

Payment allocated to Invoice# 1000009

Thank You Very Much!

Reports

Services Due\No Response

The report is ordered in surname / first name descending hierarchy.

ABC Test Data

Services Due/No Response

5/08/2023

No date restriction.

Client	Contact Details	Vehicle Details	
Beecroft, Dave, Mr	H: (0427) 994559 M: 0422269726	9PLO895	NISSAN PATHFINDER
		BBC123	TOYOTA COROLLA
Booth, Sean	H: (08) 94514034 M: 0422269726	967253	ALFA ROMEO ALFASUD
Cannington Denture Clinic	W: (08) 94511477	G0123	Bmw 740il E38 V8 EFI 94/97

Open Invoices By Client

If an order number has been added it is now referenced in the line item.

ABC Test Data

Open Invoices by Client

5/08/2023

Client	Date	Vehicle	Inv. No.	Order No.	Terms	Age	Balance
Beecroft, Dave, Mr							
	25/03/17	9PLO895	1000010	This Order Nu	30 days	2,324	$237.95
	22/02/17	BBC123	1000011	8276354	30 days	2,355	$110.00
					Total		$347.95

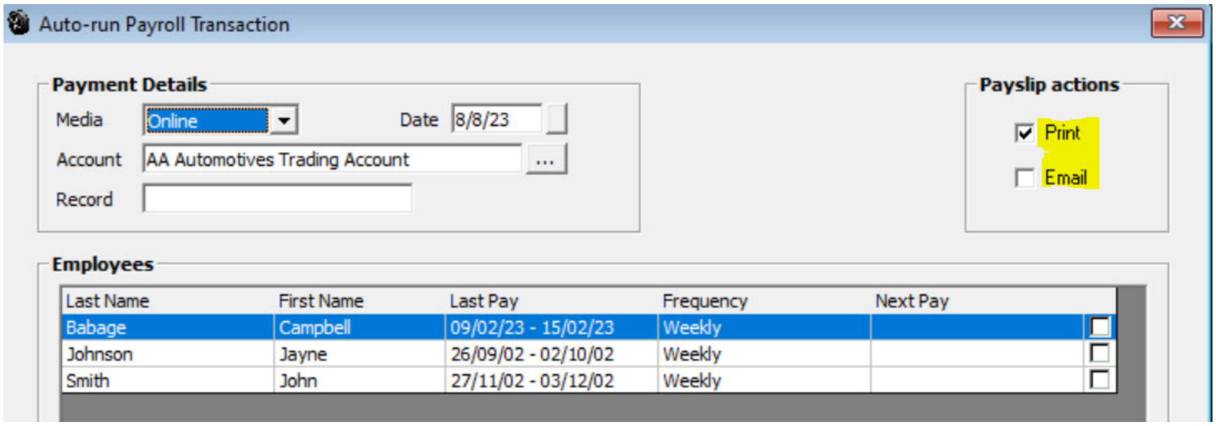
Payroll

Batch Run Preview

Firstly, the preview function allows for batch creation of new payslips. So, until they actually exist, they cannot be previewed. Unlike statements which are reports of historical data that already exist. The 'preview' such as it is indicated in the 'next pay' column which tells you what the payslip will be IF you tick that item and then proceed to create it.

Secondly, you now have the ability to select email and/or print options for the batch of payslips, or even neither if you simply wish to create the records without printing or emailing.

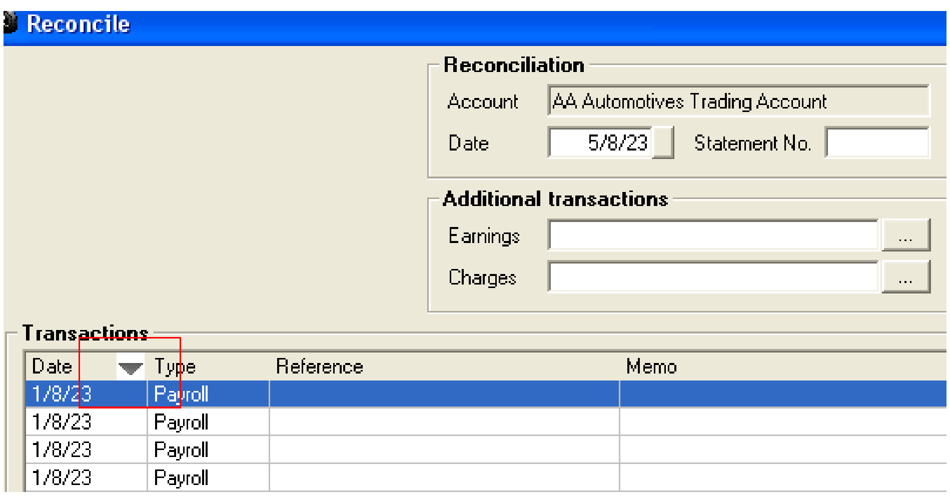
Finally, you can't 'delete' records to be batched here, you simply UNTICK them if you don't want to include that one in the batch. Or rather, you only TICK the items you DO wish to create in the batch. Once again, as this function creates new records, there is nothing to 'delete'.



Reconciliation

Sort Options

The reconcile form now has the ability to select any of the three columns: Date, Debit, Credit. Selecting that column once more will then toggle the ascending/descending order as indicated by the arrow (which has been made more prominent)



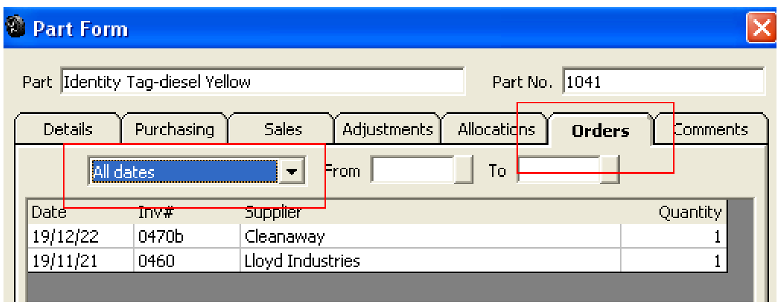
Parts List

Orders

The parts list displays a new on order column:

	Type	On Hand	Allocated	Available	On Order	Alt	Reta
	Inventory	5.00	5.00	0.00	0.00	*	$7
	Inventory	0.00	0.00	0.00	0.00		$21
	Inventory	0.00	0.00	0.00	0.00		$2
	Inventory	0.00	0.00	0.00	0.00		$9
	Inventory	0.00	0.00	0.00	0.00		$9
	Inventory	0.00	0.00	0.00	0.00		$65
7	Inventory	1.00	0.00	1.00	0.00		$9
	Inventory	0.00	0.00	0.00	0.00		$20
	Inventory	0.00	0.00	0.00	0.00		$20
	Inventory	0.00	0.00	0.00	0.00		$14
	Inventory	0.00	0.00	0.00	0.00		$
	Inventory	0.00	1.00	-1.00	0.00		$75
	Inventory	-1.00	0.00	-1.00	0.00		$59
	Inventory	10.00	1.00	9.00	0.00		$
	Inventory	-2.00	0.00	-2.00	2.00		$
	Inventory	-1.00	2.00	-3.00	1.00		$
	Inventory	-1.00	0.00	-1.00	1.00		$16
	Inventory	3.00	1.00	2.00	0.00		$6

When you edit the part, you can view the orders from the orders tab (**Note:** if the orders are not displaying, check you have 'All dates' selected)

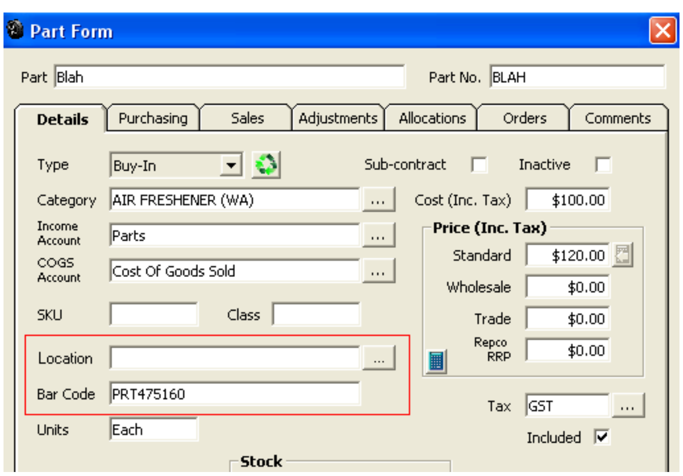


Double clicking on an order will open that order up in purchasing.

Part Form

Buy-ins

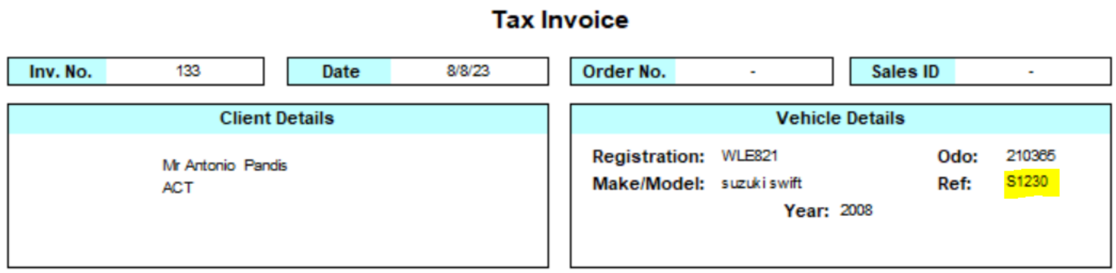
Buy-ins: now display barcode & location fields



Invoice Layout

Reference

The vehicle reference field is now printed on the invoice



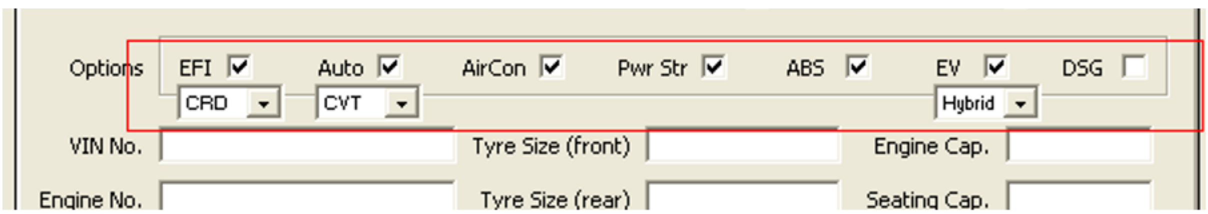
Vehicle Form

Additional Fields

EFI Selections: If EFI when selected allows a choice from a drop-down menu MPFI, GDI, CRD.

Automatic Selections: If Automatic is selected allows a choice from a drop-down menu DCT, CVT.

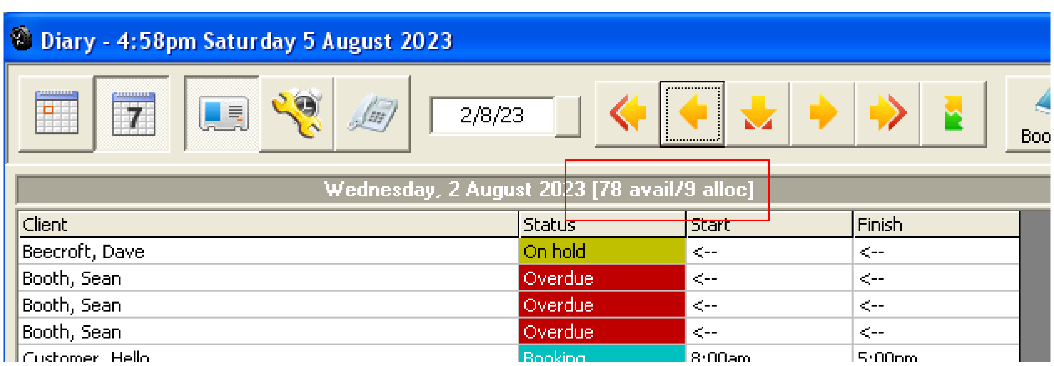
Electric Vehicle: If selected choices from the drop-down menu PHEV, Hybrid, EV



Diary

7 Day View

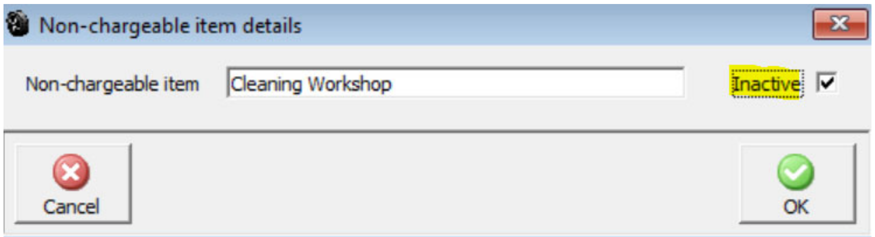
When in 7 Day view we show the available \ allocated hours in the header of each day.



Non-Chargeable Items

Inactive Control

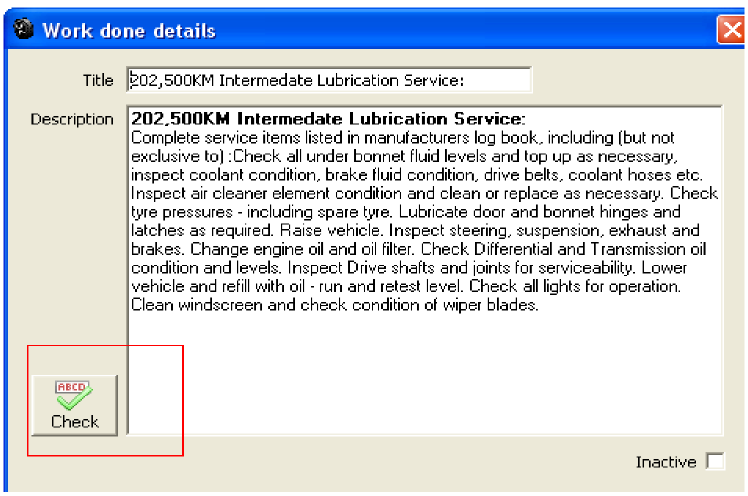
Added the ability to make inactive



Work Done List

Spell Check

Work done and faults now have spell check.

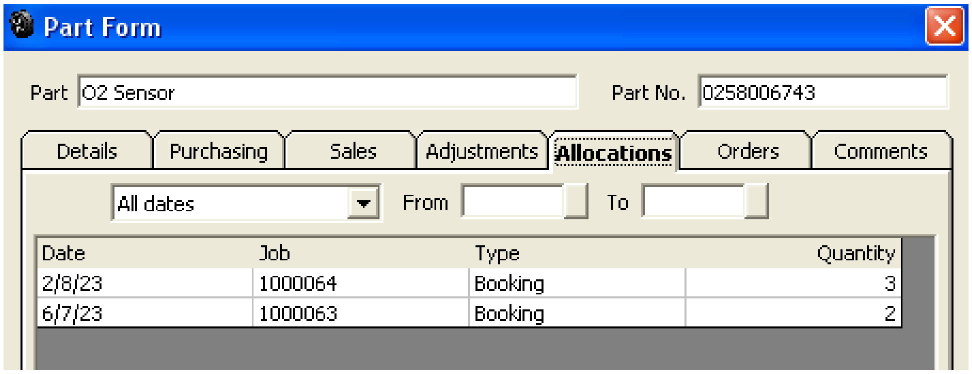


Purchasing

Allocated Parts Bookings

Parts allocated to bookings are now included in the allocation's totals

Also the parts form itself will show the allocated amount, AND you can view those allocations from the allocations tab:



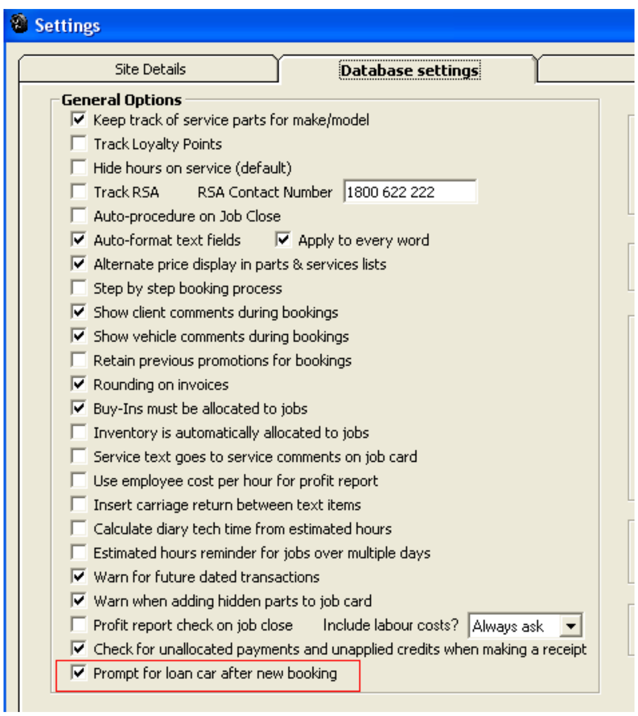
Booking Process

Loan Car

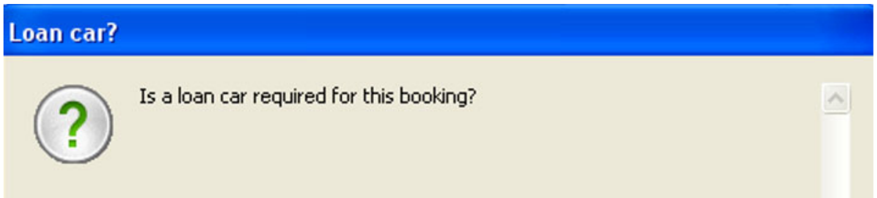
An option has been added to assist users assigning loan cars to clients.

A prompt box displays after a booking is created that reads - "loan car required for this booking? Yes or No". If yes is selected, the loan car allocation window opens up with the customer already selected and the date and time set to match the booking.

To activate this feature there is a new setting in Site Settings / Database Settings



Ensure the option is ticked. Create a new booking. Click OK, then you'll see the prompt:

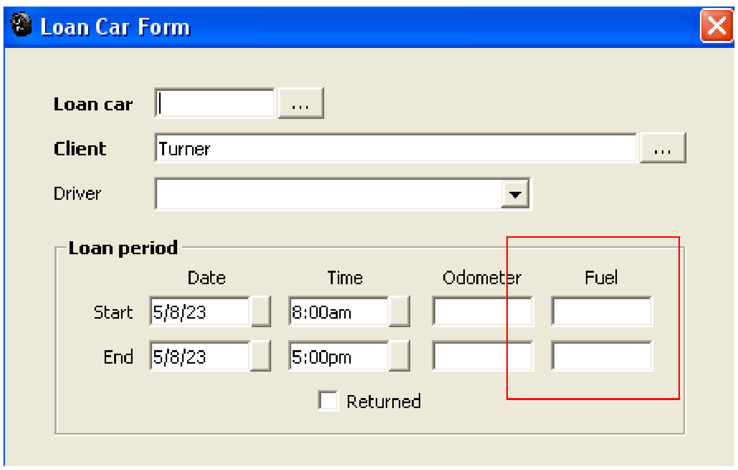


If you wish to record a booking select YES from the message screen and you'll see the loan car form popup with those booking details already filled in. Complete and save to enter into the diary screen.

Loan Cars

Fuel Levels

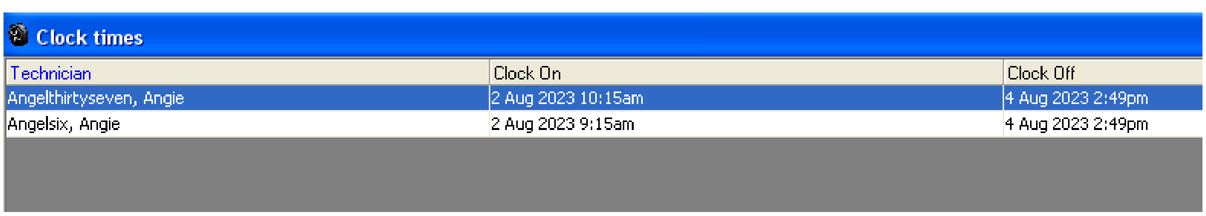
New fields for fuel levels, similar to Odo



Technician Clock On Times

Times Hierarchy

The ordering of clock times now shows the most recent at the top

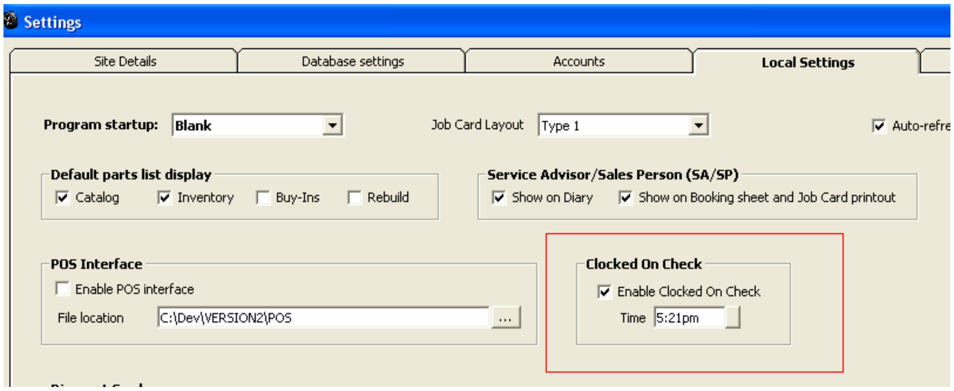


Clock On Times (Staff & Technicians)

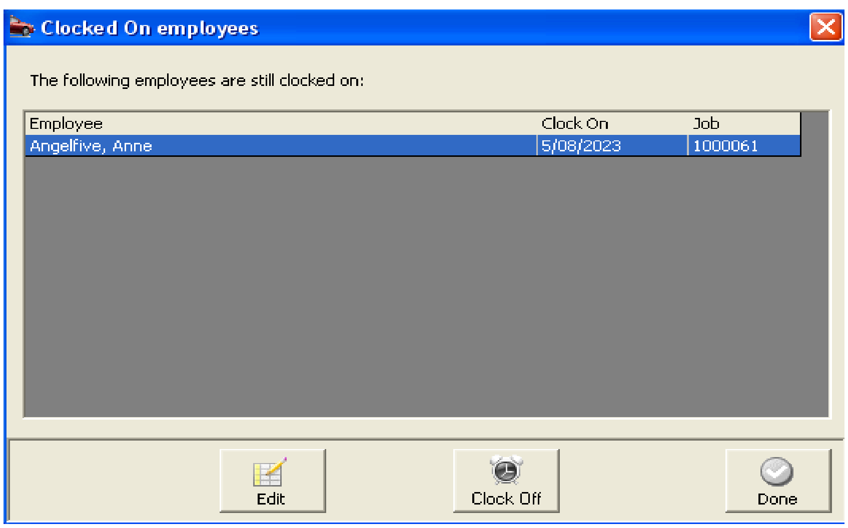
Clocked On Warning

A new feature that warns an operator that they have employees still clocked on, this can be set for whatever time the check needs to take place ie: 5.00pm, the warning displayed who is clocked on with the ability to clock them off if required.

There is a new setting to check for clocked on employees in site settings / local settings



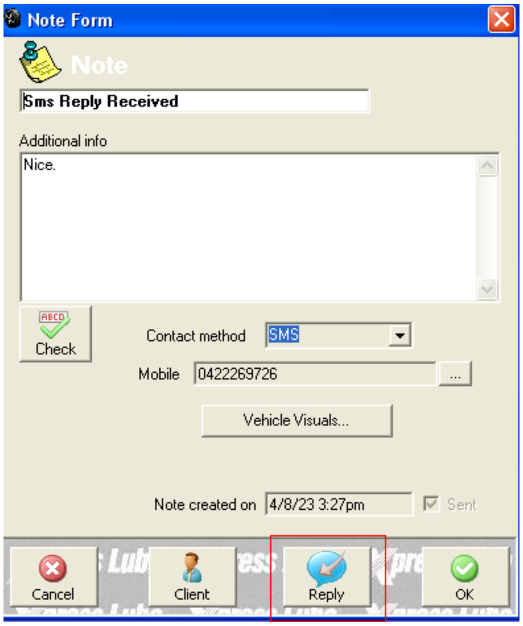
If a technician or staff member is clocked on when the check takes place a clocked-on employees' screen is displayed, to clock an employee off simply highlight the record and select the clock off option. If you wish to edit the record select the edit option.



SMS Messages Received

Reply Option

Version 3.8.6 allows you to reply to the client directly from the note form, select the new reply option to type your message and send.



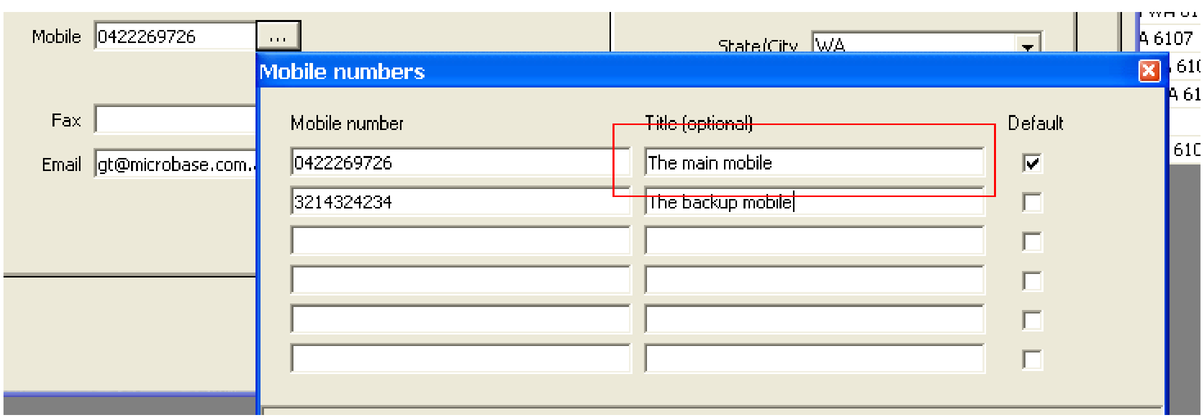
Selecting the reply button will create a new note, automatically selected for SMS to the same client, which you can send simply by entering your desired text and hitting OK.

Client Form

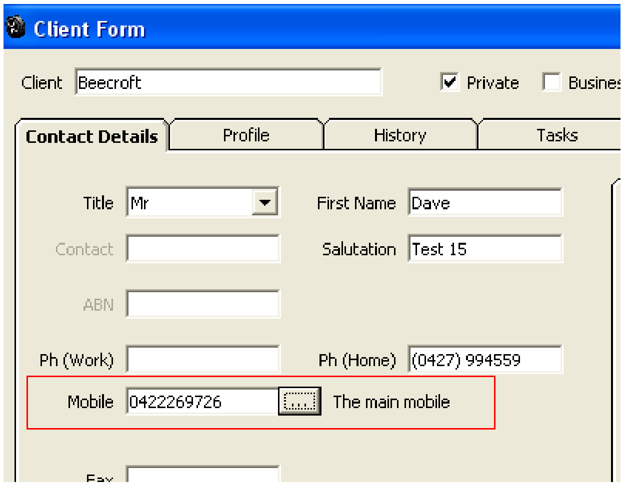
Mobile Reference

We have added the ability to display the reference applied to a mobile # directly on the client form.

Go to a client, and select the three-dot button after the mobile number field. Ensure there is a value for both the number and the title, then hit OK:



You'll then see that number and title displayed on the client form:



Online Job Card

Expanded Search

Whilst on the online job card, in any browser you can simply activate the 'Find' function **(typically Ctrl+F)** to search for any term, anywhere on the entire page.