

AUTOMATION VERSION HISTORY

Version Enhancements: Server 3.3.8

Pre Installation of new development module to allow for upcoming new program functions.

Version Enhancements: Client 3.5.5

Inventory Valuation introduced 2 methods of viewing the report one that looks at inventory currently on hand the second method calculates all stock movements, adjustments, variations and journals to give a final figure as of any date.

AR Aging Summary can now be run 2 ways, firstly by date which allocates all payments received by date hierarchy, secondly by payments allocated to individual invoices.

Parts Import expanded the import criteria to include items with barcodes and/or locations only.

Task Manager to Do Lists Fixed the problem of not being able to attach lists to a new task, also changed the title on the task form.

Utility Menu introduced access in the operating system program tree to the Set Server utility.

Optimisation introduced various tweaks to the code to improve performance.

Version Enhancements: Client 3.5.4

Attachments and Checklists have been rewritten to accommodate new functionality and usability for both Online and Local installations.

Email confirmation green tick now being displayed in client history screen.

Version Enhancements: Client 3.5.3

Diary new ability to organise entries on the diary screen by drag n drop.

Roadworthy/Images the process in recording roadworthy details and the saving of images to jobs has changed to allow for synergy between local and online versions of the program.

Version Enhancements: Client 3.5.2

CovsOnline integration allows for parts ordering and invoice retrieval similar to Repco Navigator.

Various code changes and enhancements to accommodate error messages sent through to Microbase.

Version Enhancements: Server 3.3.7

Version Enhancements: Client 3.5.1

Various code adjustments to improve both Server & Client functionality.

Version Enhancements: Client 3.5.0

Various code changes and enhancements to accommodate error messages sent through to Microbase.

Version Enhancements: Server 3.3.6

Allows the conversion and setup of databases to be run remotely.

Version Enhancements: Client 3.4.9

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Client & Server include many query optimisations that will improve data access speeds in many areas of the program.

Changes to the order display status for parts on the job card when using purchase orders.

Changes to the Opt out Marketing feature.

Version Enhancements: Client 3.4.8

Annual update to the ATO Tax tables.

Part quantities now correctly flow through to the purchase order.

Changed discount description on invoices.

Version Enhancements: Client 3.4.7

Profit report, re-aligned discount values for both parts and labour to correct grand totals.

Printing new ability to exclude client details when printing any job card type, new selection in Printer Settings.

Version Enhancements: Client 3.4.6

Re-formatted the job card profit report to give correct allocations to labour & parts discount entries for both charged & actual tables.

Added a new 3 digit Branch field in site settings adjacent to the ABN number this will be reported in the EMDUPE file if required.

Removed the comments field in the deposit form which was a non-recordable field from version 2 and no longer needed in version 3.

Extended the client column on the received SMS messages display to accommodate long names.

Corrected an error when submitting the EMDUPE file in to the ATO's portal where the business utilised both trading name lines in site settings.

Version Enhancements: Client 3.4.5

Various code enhancements to optimise functionality.

Version Enhancements: Server 3.3.5

Various minor optimisations and improvements to Server operation.

Version Enhancements: Client 3.4.4

Reports:

Promotions Response report now has ability to select single/multiple/all promotions to filter.

Sales by Service report accessed in the Sales Reports. Allows for selection of all / single / multiple services over a date range.

Deposit report Credit card and EFT are now both listed separately and all receipts are listed individually under their specific payment types.

Roadworthy New quarterly audit report (See Roadworthy function below).

New report under Payroll reports – 'EMPDUPE Data file' (See ATO section below).

New report under Payroll reports – 'SAFF Data file' (See ATO section below).

Receipt Report re-positioned client details to accommodate both DL and DLX envelopes.

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Client Form:

New item has been added to the terms "Cash on Delivery" and is now the default setting for new clients.

New column added to the History tab titled **E** a green tick will appear indicating invoice has been emailed to the client.

New discount feature has been expanded to allow for either a total discount applied to parts and labour, or individual discounts applied to parts and labour.

Client Listing:

Mobile 2 has been added to the client pick-list.

Flag has been added to the client history listing indicating whether invoice has been emailed.

Bookings:

When flagged in Site Settings Client comments will appear during booking process.

Diary:

New option to display jobs by status – Bookings, Work in Progress, Closed and loan Cars.

Tech Time/Clocked Time:

In the tech time/clocked time view there is now a dividing bar in the middle of the screen. This bar can be dragged and dropped to move its position up and down. Please also remember you can double click on the tech time/clocked time view button itself to toggle the display between exclusively tech time, exclusively clocked time, or both (default).

Vehicle Listing:

Added the VIN# to the listing with the ability to search by Vin#.

Vehicle Form:

New vehicle types added to the menu **SUVFWD, SUVRWD, SUVAWD, & UTE.**

Ability to send an SMS directly to the allocated driver of the vehicle from the Driver tab in vehicle form (NOT Client).

Roadworthy Function: (Victoria)

Added new choices in drop down lists and created the quarterly audit report to make this function VIC Roads compliant.

Transactions:

Comments from transactions are now displayed in the general ledger as well as reconciliations. They are included in the "Reference" column.

Security:

New security setting in user form "Access till drawer" only if ticked can the till drawer be opened from the receive payment form and F9.

Deposit:

Deposit account listing no longer displays account balances they are displayed in the deposit form only.

Receipts:

A new email button has been added to the payments form. As usual a green tick will appear next to the button to indicate if that receipt has been emailed.

Job Card:

Add a technician notes option to the job card accessed from the Notes button.

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When a part is flagged as ordered, point and double click on the **Order** status this will open the Purchase Order.

Added the VIN# to the Work Order report.

Journals:

Ability to flag journals as recurring once a journal is flagged then you can access through Activities - Recurring Bills & Journals.

New button on the journal entry form "Reverse" simply swaps the debits for credits and vice versa.

Inventory:

Additional filter to the Stock to Show list called "On Hand" would exclude all zero stock items from the display.

Alternate parts when a part is referenced via service attachments or self-learning, if the part is not in stock and has an alternate part a prompt will appear to use the alternate.

Under settings/accounts – new option Inventory accounts, gain and loss. Able to select the account you wish, defaults to Inventory adjustments gain / loss.

Parts:

Part form under the Sales tab now has the ability to include catalog sales.

ATO:

SBR – Able to submit PAYGW summaries digitally. New report under Payroll reports – 'EMPDUPE Data file'. This report is used in exactly the same way the group certificates and PAYG summaries are. You select the employees you wish to report on, select the date range (should be a financial year), and it will create an EMPDUPE file according to the ATO specifications. The output file is located in:

C:\Automation Client\EMPDUPE\EMPDUPE.A01.

Super Stream – Ability to transfer contribution information directly to the ATO clearing house. New report under Payroll reports – 'SAFF Data file'. This report is used in a similar way to the super contribution report. You select the employees you wish to report on, select the date range and it will create a SAFF.CSV file according to the ATO specifications. The output file is located in:

C:\Automation Client\SAFF\SAFF.CSV.

Version Enhancements: Server 3.3.4

Settings:

File creation & FTP optimisation changes for Global Red/AMS functionality.

Version Enhancements: Server 3.3.3 & Client 3.4.3

Client:

Additional content to both Server and Client to accommodate Iveco and Massey Fergusson dealerships.

Version Enhancements: Server 3.3.2

Server:

Performance Enhancements.

Version Enhancements: Server 3.3.1 & Client 3.4.2

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Server & Client:

Various code changes and enhancements to accommodate error messages sent through to Microbase.

Version Enhancements: Server 3.3.0

Transfer:

Re-coded server transfer function to improve data integrity.

Version Enhancements: Server 3.2.9 & Client 3.4.1

RACV: (Victoria)

Enhanced the sFTP code to allow for capture of backdated invoices.

Navigator:

Re-coded Navigator integration to alleviate the occasional screen freeze when returning parts into Automation.

Version Enhancements: Client 3.4.0

Postcodes:

Updated postcodes database.

Buy-Ins:

Rectified a problem with buy-ins being included in the parts list when utilising the self-learning of makes & models parts.

Navigator Integration:

Enhanced the code to alleviate the screen freezing when returning parts to the Automation job card. Added extra information to the error message if the screen freezes so we can identify the cause of the freeze.

Server & Client:

Various code changes and enhancements to accommodate error messages sent to Microbase.

Version Enhancements: Client 3.3.9

Payroll:

Employee entitlements now have the ability to go to two decimal places.

Employee joined date & left date now figure into reports where employee available hours are calculated.

Modified PAYG reports to exclude salary sacrifice from gross when the salary sacrifice option is ticked in the employee form.

Diary:

Tech Time/Clocked Time View: Ability to now double click on the tech time view button to cycle through the individual display of Tech Time or Clocked Time or both Tech Time & Clocked Time views, this allows for the user to choose their preferred screen.

Job Card:

Camera/Pics button now displays a red info icon when PDF'S are saved to the job the same as when images are saved.

Reports:

AUTOMATION VERSION HISTORY

Bug fixes to reports, most notably the Service Detail report so that the divide by zero no longer occurs.

Version Enhancements: Server 3.2.8 & Client 3.3.8

Areas covered in this new version:

Overview	ABA File	Marketing	Reconciliation	Chart of Accounts
Payroll	PAYG Reports	Service Form	Labour Rates	Vehicle Service
PDF & Images	Job Card Appending	Job Card Rounding	Parts Location	Supplier Form
Technician Allocations & Clocked Times		Client Form	Driver's License	Google Maps
Bookings Buy-Ins	Invoice Message	Purchasing Unit Pricing	Reports Various	Minor Code Adjustments
Technicians Efficiency & Productivity				

Version Enhancements: Client 3.3.7

Invoice:

Vehicle information now includes VIN number.

Vehicle Form:

Introduced a change not to allow vehicle history to be transferred until all open invoices are paid by the original client.

Journals:

Re-designed journal window to allow for long account names and more entries before having the need to scroll.

Adjusted code to eliminate entries to appear twice (Ghost) under certain circumstances.

Reports:

Open Invoices by Client - Report can now be run for all clients or selective.

RACV: (Victoria)

Updated Discount Card Summary report to include multiple ways to calculate commission values.

Version Enhancements: Client 3.3.6

Service Advisor / Sales Person:

Introduced the ability to identify and display on the diary screen, technicians job card and booking sheet those staff members that have control of any or all client bookings / jobs.

Version Enhancements: Client 3.3.5

Jobs:

Introduced an internal check that stops closed jobs being saved as open jobs when multiple users on the network have the same job card open at the same time.

Rebuilds:

Corrected the inability to copy a rebuild.

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Diary & Invoice:

Increased the size of the Invoice number field to allow for larger (100,000 plus) numbers.

Client Code:

Improved integrity checker function.

Re-coded transaction engine and optimised.

Various code changes and enhancements to accommodate error messages sent to Microbase.

Version Enhancements: Server 3.2.7

Server Code:

Server Code updates

Various code changes and enhancements to accommodate error messages sent to Microbase.

Version Enhancements: Server 3.2.6 & Client 3.3.4

Server & Client Code:

Various code changes and enhancements to accommodate error messages sent to Microbase.

Version Enhancements: Server 3.2.4 & Client 3.3.2

Reports: (Added Functionality)

Job Card Profit Report Reminder

Cost Calculations

KPI Report

Financial Summary Report

General Ledger Report

Version Enhancements: Client 3.3.1

Code:

Adjusted code to allow the non-converted Estimates to be displayed from the Sales screen.

Adjusted code to allow the Journal window to display correctly.

Version Enhancements: Server 3.2.3 & Client 3.3.0

Email:

Expanded email functionality to allow for a wider variety of SMTP servers.

Sales:

When filtering buy Estimates we now show the converted estimates new job number, double click on the new job number to bring the invoice up to screen.

Code:

Various minor bug fixes

Version Enhancements: Client 3.2.9

Payroll:

Small code change to allow for multiple deductions

Version Enhancements: Client 3.2.8

Navigator/Smart Quote:

Small code change to eliminate the duplication of part numbers without matching SKU's when ordered via Navigator.

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Version Enhancements: Server 3.2.2 & Client 3.2.7

Navigator/Smart Quote:

Microbase in conjunction with Repco Auto Parts have developed a seamless interface that allows Repco customers to order parts on-line via their local purchasing module. (Refer to Integration document).

Mouse Wheel Scrolling:

Ability to use the centre mouse wheel for scrolling in all database screens and grid windows.

Clients:

Display driver contact/name in client listing.

RACV: (Victoria)

RACV Reconciliation Report: Reports - Sales Reports - Discount Card Summary.

Email:

Allow for hiding of fixed price parts when emailing invoices to clients.

Version Enhancements: Server 3.2.1 & Client 3.2.6

Server:

File Transfer: Fixed an issue of duplicate files being stored on the central server for download.

Data Backup: Default now set to 7 copies instead of All as in previous versions.

Copy Database Option: No longer "freezes" the server if this option is cancelled.

Client:

Data Pulses: No longer display at the top of the screen, the internet and database connection indicator displays

as a bar on the bottom right hand side of screen.

Typing Delays When Connecting To The Internet: Recoded the internet thread eradicate typing "freezes".

Rebuilds: Version 3.2.6 allows for crediting of returned rebuilds.

Technician Time Reports: (Refer to version document).

Hours by Technician - Hours by Job both reports have been expanded on.

Emailing: (Refer to version document).

Email Attachments: Version 3.2.6 allows for the inclusion of an HTML template to be sent as an attachment when emailing invoices.

Invoice Layout:

Footer Line & Page Number: A new print option in printer settings allows you to disable printing of the footer line and page number.

Microbase QuickSupport: (Refer to version document).

Microbase has adopted the remote access technologies developed by TeamViewer this will allow Microbase support to remotely connect to your PC.

Repco Navigator / Smart Quote: (Refer to version document).

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Version Enhancements: Server 3.2.0

RACV: (Victoria)

Introduced new host detail fields to accommodate sFTP transfer function.

Version Enhancements: Server 3.1.9 & Client 3.2.5

RACV: (Victoria)

Ability to identify RACV Member on diary screen to facilitate the scanning of member's card.

Re-configured export file to include service time stamp and categories list.

Version Enhancements: Client 3.2.4

Payroll:

Annual update to the ATO Tax tables.

Version Enhancements: Server 3.1.8 & Client 3.2.3

RACV: (Victoria)

Added the ability to FTP RACV member's data directly to Global Red

Bill Payments:

Reference search field code adjusted to improve search ability.

Version Enhancements: Server 3.1.7 & Client 3.2.2

Bill Payments:

Bill payments now display more consistently by date order.

Repco Premium:

Tier 1 Repco sites having problems accessing the the Incident and Equipment Registers should now be able to do so.

Reports:

Clocked/Estimated time report now includes open jobs.

Job Card:

Job Card Layout type 2 further optimised for lower resolution displays.

Internet:

Internet access by the program has been sped up considerably.

Settings:

New field in Bank Details – Bank Code, this allows for different naming of the ABA file based on financial institution i.e. ANZ, CBA, NAB etc.

Version Enhancements: Server 3.1.6 & Client 3.2.1

Backup:

New option to set how many backups to be kept 7, 14, 30, or All. (Days)

Added the option to choose which database/s to be backed up.

SMS:

Within the job when clicking on the SMS button we have added the option to free type.

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Various Fixes:

Booking form displaying numerals instead of true & false – **Fixed**.

When paying a supplier bill the remittance advice was printing the address instead of the billing address – **Fixed**.

When using technicians Job Card #2 the Service Notes section was displaying data from the clients comments instead

of the vehicle comments – **Fixed**.

When closing a task it creates a Runtime Error – **Fixed**.

Under certain conditions when editing a client receipt it could take up to 20 seconds for the receipt to open - **Fixed**.

RACV: (Victoria)

Adjusted code for the Global Red Data export function.

Version Enhancements: Server 3.1.5 & Client 3.1.9

Internet:

Improved code to reduce the pausing of the program when checking for internet related functions such as online bookings, SMS replies, invoice retrieval, site messages and updates.

General:

Various performance improvements throughout the program.

Version Enhancements: Server 3.1.4 & Client 3.1.7

Backups:

Automation Client will now receive notification from the server when auto-backups fail, this is an addition to the email notification sent to the email address that's in the site settings.

Reports:

Tax Reports - Tax Liability - Cash Basis re-coded report to speed up build & display.

Removed the option of running the four General Ledger reports below on a cash basis.

1. Profit & Loss.
2. Profit & Loss Comparison.
3. Balance Sheet.
4. Trial Balance.

Bookings:

Step by Step booking process now includes the Internet check box in how did they hear about us screen, also fixed the estimated hours display.

Minor Bug Fixes:

Loss of blue highlight for bookings - **Fixed**

Saving large SMS message to the log file sometimes caused an error message - **Fixed**.

Certain reports caused error message due to missing field - **Fixed**.

Certain values in some queries for vehicles caused error messages - **Fixed**.

Version Enhancements 3.0.0

Referral Reward:

The purpose of this function is to reward clients for recommending others to the same service

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facility. The referrer will have dollars added to their referrer account according to the dollar value of any jobs that are allocated to them as a referrer. Automation will allow for the creation of referrer reports based on dollar value recorded. The user will then be able to deduct globally dollars from the referrers account when issuing rewards, the dollar value for the reward will be at the user's discretion.

Additional Referral:

Booking form: Add a referral field, on selection opens the client listing for selection of a referrer.

Client Form: Addition of a referred tab – list name, vehicle make\model date of service and dollar value. Print option that produces a report listing all debits and credits to the referrers account.

Marketing: Ability to search for referrer with a dollar value above a specified amount, selection of referrers followed by the ability to enter a dollar value (deducted from the referrers account). Allow for communication with selected referrers via SMS, Email or mail merge.

Job Screen:

Designed for widescreen low resolution laptops, this screen allows for a larger area to view services and parts.

The user can select the desired job card screen from Settings – Local settings.

Type 1 is the standard screen Type 2 is the new version.

Source:

Option to print employee payment summaries to include hidden. Do not print summaries for employees with zero balances.

Add comments to the payslip.

Allow wages to be assigned to cost of goods sold – so we retain the cost of wages calculation from the job card.

Payroll:

Option to print employee payment summaries to include hidden. Do not print summaries for employees with zero balances.

Add comments to the payslip.

Allow wages to be assigned to cost of goods sold – so we retain the cost of wages calculation from the job card.

Program Log On:

Display name of whoever's presently logged on, viewed at top of screen after business name.

Log out time is now machine specific.

Sales:

Notes column added to sales screen that are linked to the client form.

Client Form:

Mobile 1 field now set as default for SMS, if 2 mobile numbers are listed the ability to set the default is still available.

Ability to flag a client to be not included in any marketing search results.

Parts Listing:

Search field will no longer clear contents when changing between active and hidden parts.

Part Form:

Re-configured price calculator to stop re-adjusting of part price when only viewing percentage mark-up.

AUTOMATION VERSION HISTORY

Reports:

Add dates when viewing more than 1 day to the technicians productivity report
Job card, include all phone numbers (also in the job card form)
Export email addresses and mobile #2 in the client list report (landscape format)
Add an average time per job to the bottom of the technician's time report
Ability to print individual site messages and SMS reply messages
P & L comparison report with any selected period.
Add productivity % to the technicians time report based on actual\Charged hours. Take calculation from employee form hours available per day and days of the week available.
Budgeting, allow for the import of last year's statistics by month.
Print Employee # on the technician's barcode report
Print booking # on the booking sheet.
Print Key # on job cards

Diary:

Introduced tabs at the bottom of screen indicating all windows/screens that are open.

Receive Payment Form:

Added a new media type "Premium".

Bank Reconciliations:

Display totals for both Credits and Debits as the reconciliation is performed.

Purchasing:

Added the ability to allocate all items on a supplier's invoice to one job/service rather than selecting each item individually.

Suppliers:

Added a Task option to the supplier form, entries to interact with Task Manager similar to Tasks in the Client form.

Settings:

Added Sales to the list of start-up selections.

Roadworthy Function:

Ability to enter all details and print reports to comply with VIC Roads audit requirements.

RACV (Victoria)

Added the ability to introduce a specified discount percentage when closing a job utilising the RACV membership card using a magnetic barcode reader.