Autoline Release Notes

Build 8.35.9304D

This document was last modified on 5th November 2008.

ADP continually improves the stability, security, and performance of Autoline. As part of that effort, it addresses issues reported by the company's customers, employees, and business partners.

ADP periodically combines any changes that arise from that process into single packages and makes them available to our customers. Such packages include previously released individual updates and may also introduce new enhancements.

> **Note**: Because release notes are incremental, this document covers only changes and enhancements implemented since the previous software build.

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Introduction

These release notes provide information about enhancements and features.

Release notes are incremental and therefore they cover only changes and enhancements programmed after the 8.35.9304C release.

Icons denote the following:

Enhancements that might require further training.

Enhancements that require parameter, system utility, or configuration changes.

System Requirements

Connection Manager, offering greater reliability and functionality over telnet, is the only recommended connection method for systems running KCML6.

Available memory (RAM) should be 18 MB per user. This increase from the prior recommendation of 16Mb is an incorporation of overall system overheads into a **per user** measure.

Windows Vista, Windows XP SP2 and Windows 2000 SP4 are the recommended operating systems for computers that run Kclient.

There are issues with the extra security that Vista enforces that means that some products have to be installed with admin privileges. See **www.kcml.com/vista.html**.

For optimal screen displays, we suggest screen resolution be set to 1024 x 768.

- **KClient version used for KCC 9304D testing** - version 6.20.38.13130 - or newer
- **KCML upgrade used for KCC 9304D testing** - version 6.20.38.13130 - or newer
- Licence upgrade to include an Autoline Unrestricted licence
- To use **KCBT**, a KCBT viewer is required on all client PCs concerned.
- KClient setup file and KCML IMAGE files for all operating systems can be found on **http://www.kcml.com/kcml/06.20/**

Note: For systems using a non-standard back-up method that creates a token file in /tmp on completion of the back-up, administrators will need to be aware that the system now uses $WORKSPACE instead of /tmp. Please refer to your Technical Consultant to ensure that changes have been made to accommodate this.

Note: New CRM and OCX integration with Outlook requires MS office XP (otherwise known as MS office 10 or MS office 2002)

The use of the integrated telephony products in Autoline requires the CAS client (minimum version 2.70.3000 build 1001) to be installed on every computer.

Note: Microsoft®, Windows®, Windows XP SP2®, Windows 2000 SP4®, Windows Vista®, Outlook®, MS Office XP®, MS Office 10®, MS Office 2002® and Windows Mobile 5® are trademarks or registered trademarks of Microsoft Corporation in the United States and/or other countries.

System Requirements (PDA)

Windows Mobile 5 device must have at least:

- 128Mb ROM
- 64Mb memory (RAM)

- Minimum 3.5 inch screen of either of the following types:

  - QVGA (240 x 320) colour
  - VGA (480 x 640) colour

- WIFI
- GPRS
- Ruggedized hardware
- Keyboard

Release Notes

Accounts

Nominal Ledger

Menu option	Form/Tab	Description
Nominal ledger > AOI Options menu > Insert NL journal entries	-	**E8/4288 NL Journal Transactions for AOI Version 3** This change provides additional functionality in AOI Options menu by enabling you to create NL Journals by using the Insert NL journal entries option. There is also a further entry to the AOI parameter settings form and daybook processing is suppressed for any NL Journals produced. Available from release 9304D Help file amendment: MS_00AI1.html

Sales Ledger

Menu option	Form/Tab	Description
-	-	**E8/3467 BACS tidy up** Fields, menu options and so on not required for third party BACS have been removed. The Start program is changed to improve BACS setup so that all files required for third party BACS are set up, and any programs, dictionaries and applications files no longer required have been removed.

Aftersales

Purchase Control

Menu option	Form/Tab	Description
-	System Parameters	**R8/46693 PC Systm reps/fs ids not Validated** This enhancement validates the following two fields: Back order clearance report id, GRN FS definition. The user must enter a valid PC/reps/PC.???.fs file.
-	Purchase Control > Receive	**R8/48720 Wipline Status change to R even received quantity is less than the quantity on wipline** It is no longer possible to amend the Required quantity in Purchase Control. If the part has been ordered via a Point-of-Sale WIP the Quantity Received and Quantity to Follow fields should now be used. If the quantity is to be reduced and the remainder from the original order is not required, the To Follow quantity should be set to zero and the backordered line in Point-of-Sale deleted.

Point of Sale

Menu option	Form/Tab	Description
-	-	**R8/47105 Parts Delivery Ctrl - delivery account** If the SO account is a Delivery account type, then the operator is unable to confirm the picking note within the POS window before a Delivery note has been printed. R8/47105 explains the reasons.
Sales Ledger > Credit Chase Menu > Credit Letters	-	**E8/4246 Standard Set of Kprint Formats** A number of the format stationeries used for frequently occurring processes for a number of modules have been given new Kprint formats. This means the new Kprint version of the format can be inserted in a parameter and used without the need for specific customisation. An example would be in Sales Ledger the original credit chase letter format was K77 and would have to be made into a KPrint format by KPrint personnel, and this could be chargeable. The user can now choose to use the new formats if they wish, or not if they don't.
-	-	**R8/47213 Part returned and postings not made** If a requisition is being reversed by changing the status to an exclamation mark and there are other parts at P status, perhaps the user wants to raise an invoice or credit, the s/ware forces the user to save the wip to action the reversal on its own. The user is unable to produce an invoice or credit if there is an exclamation mark against a part number. If the wpars parameter **Allow reverse issue** is set to **R**, the requisition button must be used.

Workshop Loading

Menu option	Form/Tab	Description
-	-	**E8/3397 Technician Status on New Touchscreen** A new button is added to the kclock form called **Status**. When it is selected a new form called **Technician status** is displayed. The new form displays all the technicians in resource code order and their current status in the workshop, by means of colour coding. If a technician is clocked on to a job then the colour is blue for work in progress. If they are clocked to an idle code the colour is yellow. If a technician is clocked off then the colour is grey. The **Status** button is also available in PDA mode and is available in online mode only. This is available in 9304D only from iteration 4.
-	-	**E8/3529 New Standard Reports for Clocking Labels and SMS Texts** Two new standard reports have been created called SMS reminder (SO.SMS.rd) and Clocked Labels per WIP number (SO.K8C.rd). The SMS reminder report will send an SMS to any customers who have a mobile phone number listed and whose vehicle is booked in a certain number of days hence. This number of days defaults to 2 but can be amended at will, as standard the report is limited to only sending 10 texts. The Clocked labels report will help users to create their own labels if required of detail clockings from a WIP. It will recognise the WIP number currently being accessed if run from within POS if the WIP prompt is left blank.
-	-	**E8/3593 Extend Barcode Facility to WIP Lines on Touch Screen** The Ability to scan WIP line numbers has been added to the latest clocking software instead of using the keyboard/mouse or the touch screen, this is also available in Offline mode including using a PDA. You can scan individual or multiple bar code line numbers and scanning the same line number again will remove the line number selection, scanning a bar code line number of 00 will select all lines on the WIP.
-	-	**E8/3650 Provide Ability to Scan Jobcards and Images for SO/BE** **Benefit Details:** • **Observation (noticeable differences)**: There is a new option in the Action for service form in Point-of-Sale which enables to the user to scan a job card or an image. A new parameter has been created in the POS Parameters 2 for storing the Scanned job cards or images archive type. • **Attribution (who gains the benefit)**: When a technician has completed the job and detailed the work carried out, the job card can now be stored as a scanned document or a picture with the job. A link to this document via CRM service history enables the user to view the scanned document at any time. • **Measurement (how the benefit is assessed)**: Improved customer service as better monitoring of previous services, enabling the user to review extra information when checking the service history of a vehicle in CRM. A new button has been added to the Action form called **Scan Job Cards**. This enables you to scan job cards using a scanner attached to the PC or network, and the records are stored in document archive as a specific type. You can then retrieve the documents from the Document archive menu or from the Service history icon in a WIP

		and from the Vehicle record in CRM at any time.
-	-	**R8/43710 Technician drop-down in labour POS** The Multi-techs/Clockings button on the labour details form has been enhanced to work as follows. If Workshop loading is switched on the Multi-techs button will read **Clockings...** and will work as per normal enabling you to view the clocking history. If Workshop loading is switched off in the terminal details and the WL.resou file exists then the technician number field on the labour details form displays the technicians that have been created in the WL.resou file but will use the cost per hour from the labour rate. If you select * Multiple technicians from the Technician number field this enables the Multi-techs button and display the Multiple Technicians form. Each drop-down also displays the technicians that have been created in the WL.resou file. If Workshop loading is switched off in the terminal details and the WL.resou file does not exist then the Technician number field will work as per normal, enabling you to input a technician name or number. If you enter * for Multi-techs in to the Technician number field, this enables the Multi-techs button and displays the Multiple technicians form. Each field enables you to input a technician name or number.
-	-	**R8/45107 Check-in Date Overwritten because Re-checkin for Courtesy Car** You are now able to start a courtesy car booking without checking it in if the WIP has already been checked in. Click on the Courtesy car icon in the WIP and the Courtesy car booking Start form will be enabled to allow you to enter the fuel and start the booking, this will not update your check in dates and times on the WIP so you will retain your original check in date and time.

CRM Module Area

CRM

Menu option	Form/Tab	Description
Reports and enquires > Report Generator >	Define report	**E8/3419 New SD report to Delete a Batch of Contacts** This enhancement has introduced an amendment to report K99 to speed up the deletion of batches of contacts from MK.conta. A new keypath has been created. Keypath: CREBATCH/CONTSEQ.
-	Vehicle Details	**E8/3695 Print Parts and Labour Detail from Vehicle History in CRM** This enhancement has introduced the ability to print off specific labour and parts breakdown per service history line within the CRM vehicle record. Also a further option to print entire service history within the same function. This is driven by a format stationary and a CRM system parameter.
-	-	**E8/3699 MK/ovRGC Satisfies Original Contact, but does not Link Them** MK/ovRGC satisfies original contacts, and now links the two contacts together.

Menu option	Form/Tab	Description
-	-	**E8/3728 Change to Edit/Delete Priority in CRM** This enhancement introduces two new MK user access control parameters giving the ability to set a CRM record to **X** status/delete, effectively flagging the record for deletion and the other control to be used. In conjunction with this is the ability to **Autoclose** any associated department lines for the customer record to **closed** status to speed up the total deletion process for nominated users.
My Shortcuts	Customer WIP	**R8/42734 When Using Customer WIP in CRM not Loading Customer Account** If the terminal is set up as Point-of-sale access P or W (parts / wholesale) then the user will not be shown the Customer Search form prior to seeing the WIP. The vehicle will no longer be loaded even if one is attached to the customer. The account number from the customer record will be loaded on the WIP. If the terminal is set up as Point-of-sale access S or B (service or both) no change has taken place. The Search Form is displayed. The vehicle is loaded. The account number from the vehicle is loaded onto the wip.
CRM > System Maintenance > Delete batch and reopen contacts	-	**R8/51359 K99 Delete a Batch of Letters does not Open Previous Contact** A new report enables you to delete a batch of letters and to re-open previous contacts. Available from release 9304E-06 and 9304D-18 Help file amendments: • MK_SMENU.html • RG_EXEC_MK_rgK97.html

Showroom

Menu option	Form/Tab	Description
Quotation	Enquiry Builder	**E8/2689 Repayment Pause within Showroom Finance set-up and Calculation** Users can add a repayment pause of any duration at any time during the repayment of a finance deal. Two new fields have been added to the finance scheme definition tables (Hire purchase - SR.fchip, Hire purchase with balloon - SR.fchpb and Personal contract purchase - SR.fcpcp). Help files amended: • SR_COMPR.html • sr_hp_scheme_form.html#FORM

-	Quotations	**E8/3718 Prevent Sales Exec Access to Profit Statistics in SR Enquiry** A new validation has been added to SR.users (Salesperson Settings) and SR.systm (System Parameters) PROFIT for **N** Not available.
-	-	**E8/3741 Updated Icons and Corp ID for Showroom** This enhancement updates the current showroom icons and introduces the new corporate ADP imagery to Autoline.
System Maintenance > System Parameters	Priority Tab	**R8/42837 Ability to Cancel an Existing SR Enquiry** Entering the priority required enables users to exit without saving the enquiry during the Showroom process. **Note**: If the user priority is lower than the exit priority when recalling an enquiry, the user can exit without saving until the enquiry is altered or the specification viewed.
Showroom CRM > Quotations > New Vehicle	Vehicles Matching Criteria Entered	**R8/46544 Unable to do Advanced Search if only one Franchise and Model** The **Advanced** toolbar button enables you to carry out an advanced search.
-	Custom Entry Vehicles	**R8/45425 Showroom - VAT Qualifying Flag on Custom Entry Vehicle** Because custom entry vehicles have no stock record they cannot have the VAT. We have introduced a new column in SR.quote called CEVATQ. CEVATQ flag will now only be set to **Y** or **N** depending on user input against customer entry vehicle details. (In other words, no input is made in this respect for new vehicles.) 1. If the user selects **U**sed, then the check box value will be stored in the CEVATQ field as either **Y** or **N** - flag switched on, flagged switched off 2. This will have no effect on New custom entry vehicles (the CEVATQ field will never be populated). In other words, the VAT qualifying flag is not enabled, therefore CEVATQ = " " 3. This will have no effect non-custom entry vehicles (the CEVATQ field will never be populated)
Showroom > Miscellaneous options > Finance maintenance > With a PCP finance scheme selected click Excess by CC		**E8/4123 Provide alternative Cap bank PCP/HPB excess mileage entry** Autoline allows for excess mileage to be calculated on a PCP scheme by franchise/model/variant vehicle mileage. However, some finance companies calculate excess mileage payments based on engine capacity. This enhancement allows PCP schemes to be set up using the engine capacity of the vehicle (in CCs).

		Available from release 9304D-11
		Help file amendments:
		• sr_fin_main_form.html • sr_hp_scheme_form.html#charge

Environment

Global Master Module

Menu option	Form/Tab	Description
-	-	**E8/3162 Add New Form for Wait Messages** The form to create a GB_wait_message has changed to provide more helpful help messages. Now the icon can be changed to show the severity of the error. Additional text can be added and in extreme cases a Help button can also be added to help the users solve the problem themselves.
Utilities menu	-	**R8/41857 Allow Testing of Slow Lines** There is an option called Bandwidth simulator which enables programmers on fast lines to simulate the affect on a new form in countries with slow lines.
System Maintenance	Create File	**R8/44498 Improvement to Global File Handling** This QA makes changes to the Create files option: The form no longer sets the ticks in the Create column by default for files not yet created. Also, global files that exist, are now described as **Company 00 file**. A new legend has been added to the File usage form with a new colour grey is used for **Company 00 files**, if present. A new message has been added to the maintenance forms of a global file.
System utilities > Management menu > Database auditing	-	**E8/3772 Database Audit Pointless for Recording KCC Changes** To cater for the situation where a generic userid has been set up, thereby making it difficult to ascertain the person responsible for the change in Database Auditing, TERMINAL, IPADDRESS and MACADRESS to View / print audit logs is added. Format SU.K01.fs is updated Available from release 9304D Iteration 10 Help file amendments: SU_AUDLG.html

System Utilities

Menu option	Form/Tab	Description
System Utilities > Management Menu > User Details > System Tab > Advanced system user (ASU)	System Tab	**E8/3752 New Access Level between 8 and 9 for HSP Users who had kcc** This field itself is available only to priority 9 kcc users, so it is a support function to give one or more users this access level on any system. It allows the necessary indemnification process to be completed. The Utilities menu functions that are available to this new advanced system access enabled user are as follows: • Menu editor • Format stationery • Report generator • Administrator • CRM • Data maintenance • Display users - Allow access only to the users attached to this users library • Release notes • KCBT - View mode • KCBT - Interactive Mode

Vehicle Stockbooks Module Area

Vehicle Stockbooks

Menu option	Form/Tab	Description
Vehicle Stockbooks > Miscellaneous options > Detailed Posting Tables	-	**E8/3511 Ability to Allow Posting by Sub-Model code** **Benefit Details:** • **Observation (noticeable differences)**: The user should not see any difference with regards to the day-to-day system functionality. However, when the system is configured the option to post at sub model level provides an alternative to posting codes. • **Attribution (who gains the benefit)**: Posting codes are limited to single character alpha numeric values, therefore there is finite number available. Posting at sub model level removes this restriction. • **Measurement (how the benefit is assessed)**: Posting at sub-model level allows greater flexibility to the user enhancing the ability to analyse performance. The facility to post at Sub-Model level is now available.

		Available from release 9304D Help files amended: • VS_PTEDT.html • GB_EDIT_VS_SYSTM.html