

Prior Release Details

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V 6.5.52 Improved Purchase Orders Screen Loading hundreds or thousands of P.O.s now takes seconds compared to minutes Can now select multiple P.O.s and delete as many as are selected 'Delete' Button can be configured as a security area (password protected) Vehicle Memo now saves to the current open order when checked In Parts Entry dialog, turning off Display now hides Profit Margin field F4 Invoice Search dialog now allows searching for large Invoice Numbers Emailing from revision now changes subject, body and email attachment to reflect "Estimate" (no longer mentions Revised Order) Purchase Order Worksheet & Parts Ordering dialog now show "Vendor Qty" instead of "Avail Qty" to clarify that this is the Qty the Vendor has Follow Up Reports no longer include results from the next day when using Date Ranges Counter Sale Invoice now displays Company Name Fixed issue when transferring a revision to a new invoice with no line items. Now, depending on Setup option of convert Invoice to RO on change, you will either have an Invoice or Approved RO RO w/Part Detail & Subtotals report now display Subtotal Details **V 6.5.51** Corrected Invoice reports to print line items in the same order as displayed in the order grid When selling a revision to a blank order, a new RO is now created with a matching RO# Better accuracy when calculating total tax values by starting with four digits of precision before rounding; Updated 'Posted Taxable Orders by Tax Category' report to show 4 digits of precision Added New 'Material Used - By Vendor' Management Report Parts with Shop Supply/Hazmat on order, when discounted, will calculate using their discounted price not the original part price When printing a Revision with no Order, the labor totals reflect the standard or non-standard rates specified **V 6.5.49** Committed parts were not properly decrementing when being included in a Special Order Previewing Manager printout (Estimates, ROs, Invoices and all reports) will now open in the foreground Calculation of Shop Supplies and Hazmat fees on revision modified to base calculation on open revision Xcharge payment receipt can now be printed on the Invoice Repair button now launches ProDemand/ShopKey Pro without requiring a login. Additionally, if a VIN is present on the order, that will be sent to better identify the vehicle Tab order on Customer and vehicle screen corrected **V 6.5.48** New "SocialCRM Reports" button with notification star that alerts you when a new review is received New "SocialCRM Reports" button with direct link to SocialCRM dashboard reporting New "SocialCRM Details" button with notification star when reviewing a specific consumer's data during their visit New "SocialCRM Details" button displays all communications sent via SocialCRM service for the specific consumer you're working with **V 6.5.47** Large database performance enhanced using additional database indexes Purchase Orders were doubling quantity required Purchase Order button on main tool bar now visible for all versions Cosmetic changes made to Florida Invoice templates, Wisconsin templates and standard estimate templates **V 6.5.44** Manager no longer overrides the number of XCharge receipt copies to print All disclaimers for Estimates, Repair Orders, Invoices, and Counter sales are now able to store and print 1200 characters Added an Inventory Quick Search button to the main tool bar, this window remembers the last category searched ATD catalog enhanced to include Tire Ply Tire size will now transfer from tire promo screen to ATD catalog to speed searches Purchase Order Edit Screen now includes tire size field Picklist functionality now includes tire size **V 6.5.42** Scrolling to the bottom of a customer list in the New Order (F6) screen no longer crashes the application Counter Sales may now be printed without vehicle information RepairLink catalog from OEConnection now available for install from m1files.com **V 6.5.40** Add VIN Code to underlying query: Tech worksheet now displays VIN Engine code (Ex: `VIN (P)`) Extra information will be in the engine string will be displayed as "6.6L, V8 [403CI] VIN [2]" rather than simply 6.6L, V8 [403CI] Purchord.rpt update: Replace purchord.rpt file with version dated 5.13.14 - this report now sorts by part number then description. `The "Estimate#" field is suppressed when the estimate number is -0-. Add YMM Engine Info and In Mileage to Intent Title bar: Add YMM Engine Info and In Mileage to dialogs used for Estimator, TSBs, Fluids, and Maintenance Add fixed WIP Reports: WIP reports will print customer name if there is a company and customer name included in the record ACDelco / Nexpart Catalog Direct: Included new ACDelco, Nexpart catalog that supports direct ordering from inside catalog. Orders placed from within the catalog will also automatically generate a purchase order Order number on WorldPac orders: Ordering Parts using WorldPac will include RO #: 29298 rather than Repair Order #: 29298 Allroad problem and BMW models: Fixed

database to display Audi "allroad" and missing BMW models Make the ProDemand windows sizable: Intent window now opens full screen and is sizeable. Committed Value: Inventory Committed value is now non-editable; this update also recalculates committed quantities for each committed part on open repair orders. Interactive home screen: The product screen is now interactive and includes buttons to link to important news LowInvtryPartNo.rpt: Added Location to LowInvtryPartNo report Labor item should display **<none>** for tech when configured as **<none>**: Labor line created will by default show **<none>** for technician when one has not been assigned. Revision with multiple POs: Fixed a defect causing the application to crash when a revision had multiple PO's for the same part number. **V 6.5.37** Email PO to vendor if email address exists: Purchase Order screen now has email button to mail PDF version of the PO to the vendor Revision Authorization screen: Add "Received Text Msg" to Revision Authorization screen under Called / Phone drop downs Duplex Printing Problem: Explicitly call out for default duplex mode when configuring printer PO Button: Include a Purchase Order Button on the main toolbar **V 6.5.34** Follow-up letters: Follow-up letter now display 'Recommendation made on:' date Highlighting explanation: Included "Row Color Definition" popup to order screen Display total hours on order screen: Included `Total Hrs:` on order screen Print Tech Worksheet from WIP Detail dialog: Button added inside the Work in Progress Detail dialog to print tech worksheet Receipts: Updated receipt template to prints logo in same format as invoices Vendor Email: Added email address field to Vendor setup screen Update Chicago Estimate: A signature line now appears at the lower right hand corner of the estimate Fix Vehicle Ownership: Vehicle ownership can now be changed to New Customer record Ordered Part Line highlighted green when PO is closed/received: Part lines on an order that have been received (or closing the PO for those parts) will paint the background of that line green. Option to view existing open Order for vehicle when attempting to start a new RO: When a user is starting a new Order and is being presented with a warning that an Order for the vehicle already exists, an option is provided to view the existing work order rather than only being presented with an option to simply start a new order. Included an option in Configuration/Default Settings to disable this. Unconfirmed part on invoice displayed in red font: If an unconfirmed part is on an invoice, the line item will be painted red and not included in the invoice total Show Gross Profit Margin for Parts: The `PART ITEM EDIT` dialog now includes a non-editable field showing GROSS PROFIT margin. Gross Margin value calculated as: $((\text{Sale} - \text{Cost}) / \text{Sale}) * 100$) Yellow Grid Background: When the Customer selects the [yellow] background color from Conf/Spec Maint/Grid line colors that selection will apply to the Order Screen. ACDelco / Nexpart Catalog Direct orders: Changes to the catalog architecture support ACDelco/Nexpart change to order direct from the catalog and create a Purchase Order Payments showing twice if 2nd address contained in Marketing data: Customer with address in the customer screen and another address entered under the Market button will not show payments twice on "Cash Receipts by Payment Types" report Update Mail Merge, Mail Merge file now included the following fields (See Reports/Follow-up/*MM): "FirstName", "LastName", "SpouseName", "Title", "DOB", "EmailAddress", "Address", "City", "State", "ZipCode", "Company", "CustId", "VehicleId", "Year", "Make", "Model", "Engine", "License", "UnitNo", "LastInDate", "InspDate", "MilesPerDay", "BalanceDue", "CreditAmt", "AverageRO", "YTDTTotal", "CreditHistory", "CategoryDescription", "MembershipNo", "Remarks", "LifetimeTotal", "FirstVisited", "LastVisited", "LifetimeVisits", "PhoneNum1", "PhoneDesc1", "PhoneNum2", "PhoneDesc2", "PhoneNum3", "PhoneDesc3", "PhoneNum4", "PhoneDesc4", "PhoneNum5", "PhoneDesc5", "PhoneNum6", "PhoneDesc6", "PhoneNum7", "PhoneDesc7", "PhoneNum8", "PhoneDesc8", "PhoneNum9", "PhoneDesc9", "PhoneNum10", "PhoneDesc10", "OdometerIn", "OdometerOut" Order Screen PO Button: View PO Buttons added to order screen Date of Revisions: All revisions now display the date and time created File Menu Expansion: File menu displays last 10 viewed orders Add column to display mileage/odometer on History Screen: The vehicle screen now includes the mileage of the vehicle at the time the invoice was posted. Add "Unit #" to WIP Screen: Vehicle Unit # field has been added to the WIP screen Part Item Edit Dialog should never default to User entered Sale Price: Creating an inventory record on the fly by checking the Inventory checkbox in Order Item Edit will not set the part to user entered sale. Inherit description from Part Item Edit: Description entered into Part Item Edit is transferred to inventory search List

Price persistent problem: When saving a part to an order the list price does not persist Technician worksheet needs vehicle info color: Added vehicle color to tech worksheet Ref/Inv # lost when using copy-paste: Cutting\Copying and pasting part items now preserves the Inv/Ref# data. IN # should map to prior entry if matching: System will not allow duplicate VIN numbers Opening/Editing Recommendations: Single click now selects the recommendation for editing or deleting. Batch Payments Invoices need to sort by date: Batch Payments Window now sorts Invoices by posted date Cash receipts by payment type report: Added check number and ref data to report **V 6.5.22** Fix coupon utilization report dataset: The coupon dollar amount is now included on the Coupon Utilization Report RowColor column in Order screen: RowColor column has been removed from the Order screen

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