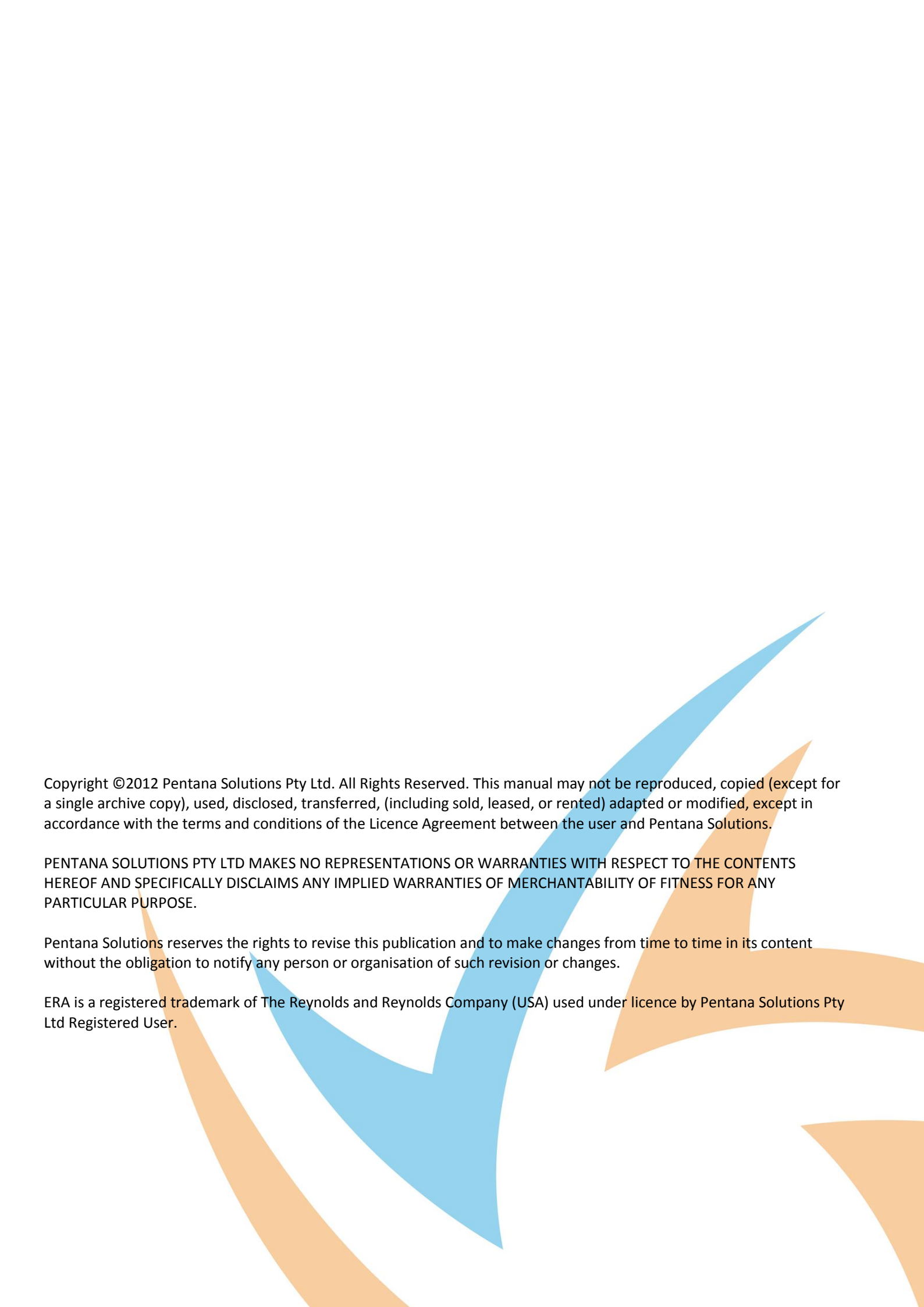




V9 Release General Manual



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ERAnet – New Support option



Enhancement

Overview

A new toolbar button labelled **Support** has been created, replacing the **DocuLink**  button. This new button opens the Pentana Solutions Support portal in a new browser window, making it easier for users to access the knowledgebase or to ask for assistance.

The URL opened when the **Support**  button is clicked can be customised by the Pentana Solutions Help Desk to reference an alternative URL, such as an internal support portal. The customisation can be a global change as well as targeted to individual users.

Why

The **DocuLink**  button accessed a web site that is no longer functional. The **Support**  button provides access to timely and relevant end-user support.

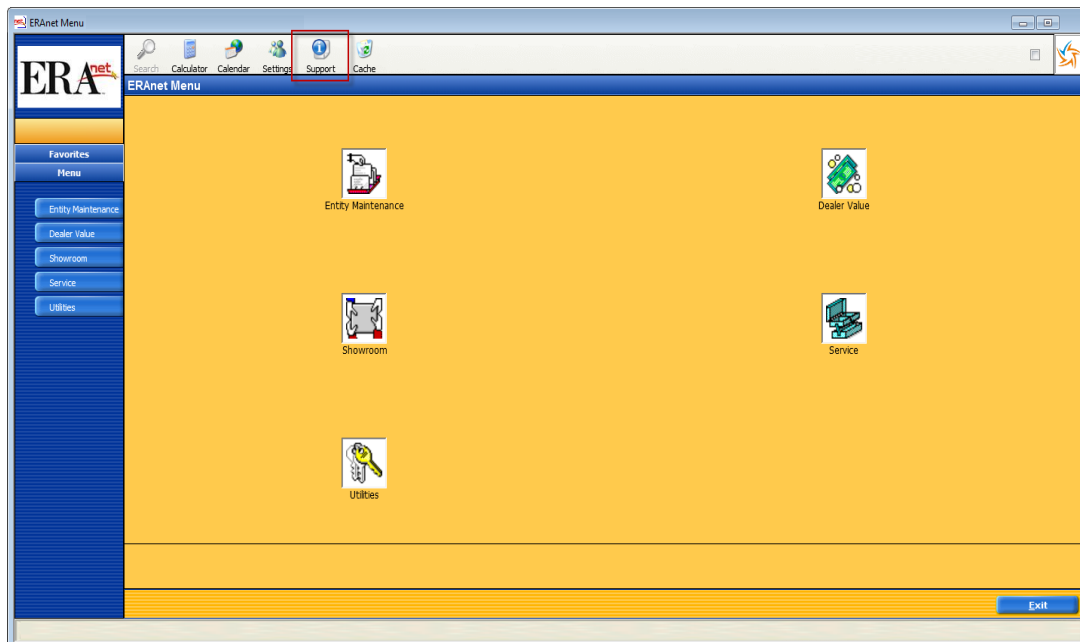
Screens



Support

The Process

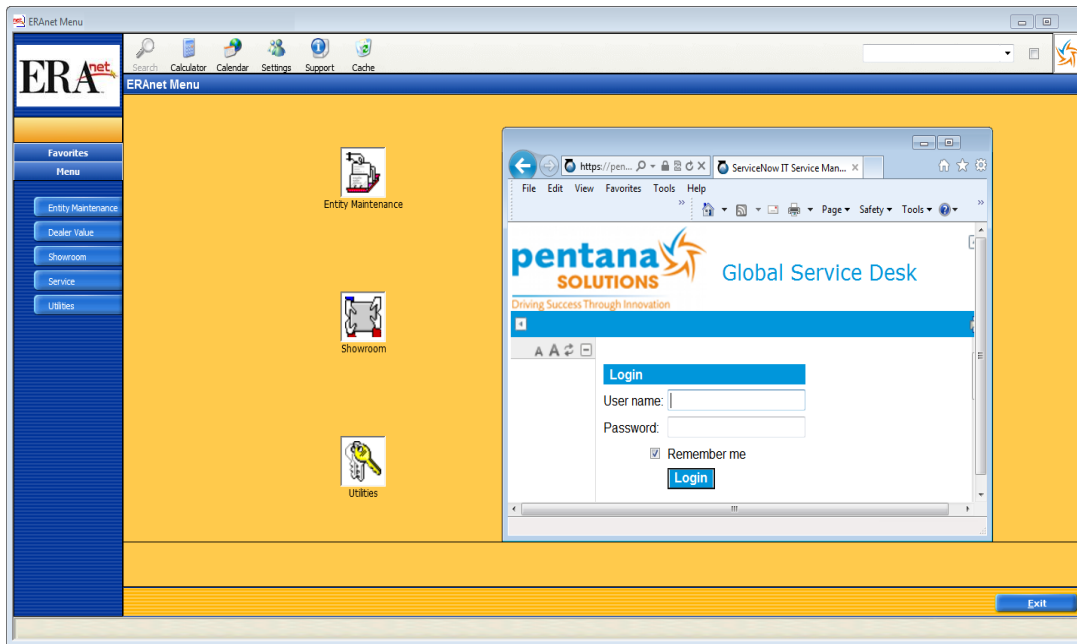
Select **ERAnet Menu** and the following screen will be displayed:



To view the new change, select the **Support** button  on the tools menu. This option is displayed in all Menus within **ERAnet** for instant accessibility.

Note: This replaces the **DocuLink** option .

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Example window browser: URL <https://pentanasolutions.service-now.com>

Benefits

This new toolbar button provides end-users with access to the most appropriate support environment for their system and dealership.

0556 – Entity Master

Enhancement

Overview

An Enhancement has been made to allow users to enter the ABRN, ACN and PPSR numbers against an entity. New fields have been added in ERA and ERAnet via 0556 – Entity Master.

Important to Note

This option will only display if you have the contact type setup as “B” for “Business” and you must have input the business name.

These new fields will also display in 2120, 3050 and the relevant ERAnet Entity screens.

Why

This change was made to bring the system into line with the new Personal Property Security register that the government is proposing to bring into effect.

Screens



Entity Maintenance
0556 – Entity Master


The Changes

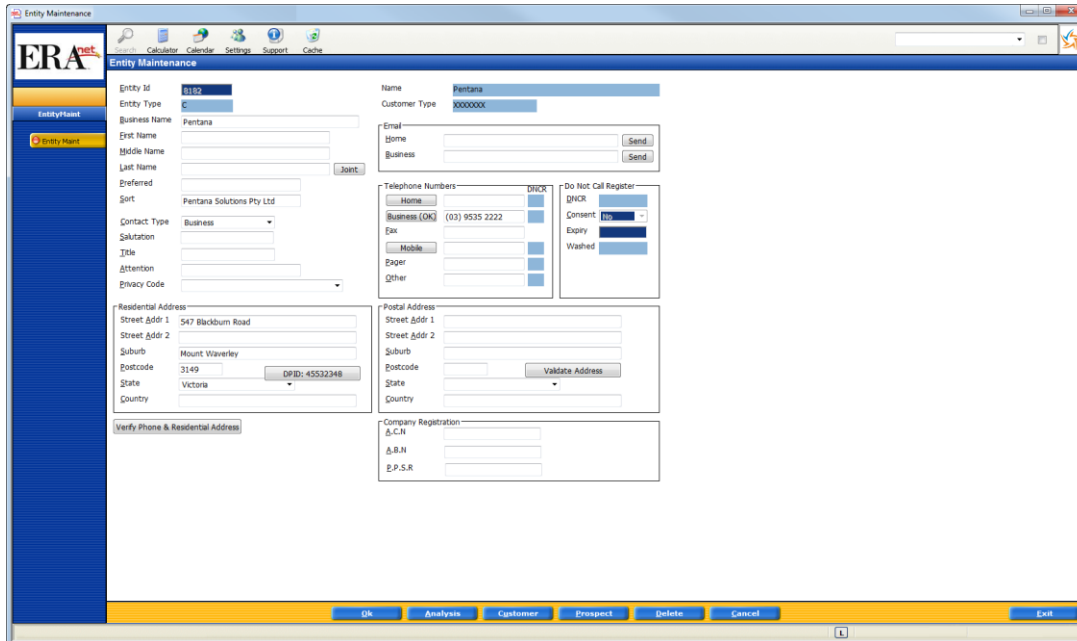
This option will only display if you have the contact type setup as B for Business and you have inputted a Business onto the entity. Additional fields have been added to ensure we have the ABN, ACN & PPS numbers recorded against an entity. Search functionality will also be added to search for these numbers within the entity file.

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The Process

ERAnet

Select  **Entity Maintenance**, enter **Entity Id** that currently is setup as contact type “B” for “Business” and has a Business name and the following screen will be displayed:

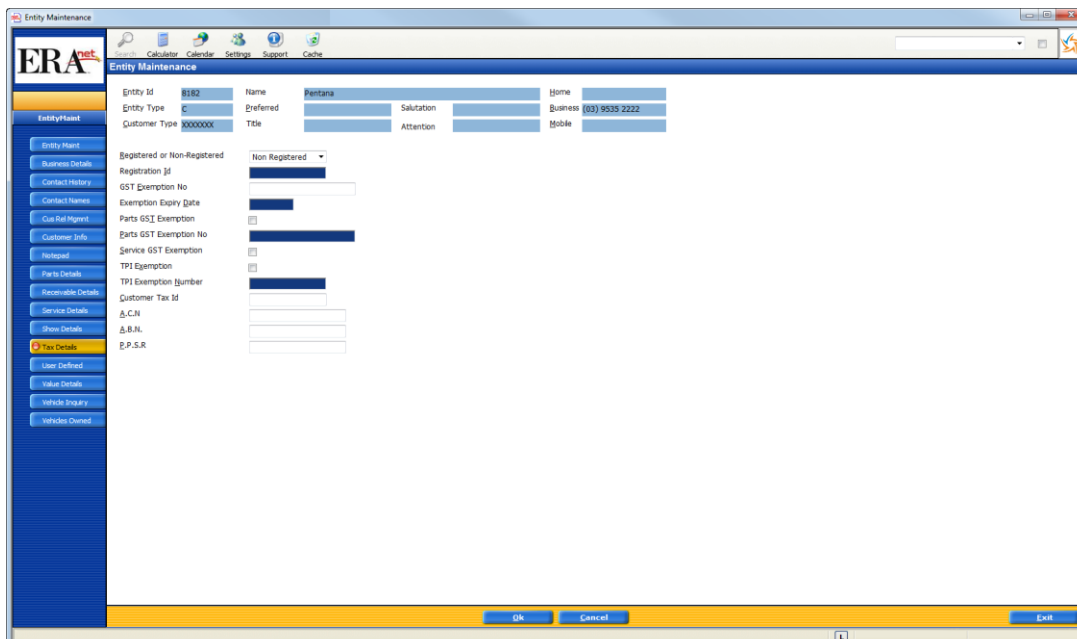


You will now have access to the following fields:

A.C.N	Select field 26 and Enter the A.C.N number for this customer.
A.B.N	Select field 27 and Enter the A.B.N number for this customer.
P.P.S.R	Select field 28 and Enter the P.P.S.R number for this customer.

These new fields are also accessible through the *Entity Master Tax Details* screen:

Select the **Customer** option from the action bar followed by the **Tax Details** option from the navigation bar and the following screen will be displayed:



New search type options have been added to be able to search by either of these numbers or partial, as per example below:

ERA

Select **0556 – Entity Master**, enter **Entity Id** that currently is setup as contact type “B” for “Business” and has a Business name in field 1. The following screen will be displayed:

You will now have access to fields 26, 27 & 28.

26. A.C.N	Select field 26 and Enter the A.C.N number for this customer.
27. A.B.N	Select field 27 and Enter the A.B.N number for this customer.
28. P.P.S.R	Select field 28 and Enter the P.P.S.R number for this customer.

These new fields are also accessible through the **Entity Master** Tax sub screen:

Select **Customer** from the command line and from the **Customer Options** look-up select option **14 – Tax Details** and the following screen will display:

The screenshot shows the ERA Entity Master screen. The title bar is 'ERA'. The menu bar includes File, Edit, Setup, Run, and Help. The toolbar contains various icons for file operations and navigation. The main window is titled 'Entity Master' and has a status bar on the right showing '0556'. The form is divided into two main sections: 'Entity Details' and 'Tax Details'. The 'Entity Details' section includes fields for Entity ID (8182), Business Name (Pentana), First Name, Middle Name, Last Name, Entity Type (C), Customer Type (XXXXXXX), Preferred, and Sort Name (Pentana Soluti). The 'Tax Details' section includes fields for Registered Or Nonregistered (NR), GST Registration Number, GST Exemption Number, Exemption Expiry Date, Parts GST Exemption (No), Service GST Exemption (No), TPI Exemption (No), TPI Exemption Number, Customer Id Number, A.C.N., A.B.N., and P.P.S.R. At the bottom, there is a command line with 'Enter', 'Modify', 'field#', and 'exit' options, and a help message 'Save the current entries'. The status bar at the bottom shows 'Ready', 'Ln 22, Col 63', and 'NUM'.

A new search type will be added to be able to search by either of these numbers or partial, as per example below:

The screenshot shows the ERA Entity Master screen with a 'Search Criteria' section. The title bar is 'ERA'. The menu bar includes File, Edit, Setup, Run, and Help. The toolbar contains various icons for file operations and navigation. The main window is titled 'Entity Master' and has a status bar on the right showing '0556'. The form is divided into two main sections: 'Entity Details' and 'Search Criteria'. The 'Entity Details' section includes fields for Entity ID, Business Name, First Name, Middle Name, Last Name, Entity Type, Customer Type, Preferred, and Sort Name. The 'Search Criteria' section includes fields for Search For (All), Search Name 1, Search Name 2, Suburb, Postcode, Phone, Entity Type (CP), Customer Type, Rego#, Stock#, Serial#, Deal Number, Quote Number, ACN or ABRN (123-), and PPSR. At the bottom, there is a help message 'Enter a company registration number to search for'. The status bar at the bottom shows 'Ready', 'Ln 12, Col 67', and 'NUM'.

Benefits

This change was made to bring the system into line with the new Personal Property Security Register that the government is proposing to bring into effect and allowing the user to search by this will make it easier to identify the entity record.

6230 – Print Audit File Report – MAINT.CODE.UPD

Enhancement

Overview

An enhancement has been made to the audit file report to include a new equate *MAINT.CODE.UPD* which indicates if the *Model Maintenance Code* has been updated automatically or manually.

Why

This change was made to enhance the existing audit file report.

Screens


6230 – Print Audit File Report

The Process

Select **6230 – Print Audit File Report** and the following screen will be displayed:

Enter File Type	To view the new change, enter SRN or select this option from the /Lookup .
Start Date	Enter the start date or enter past this field to default to the current date.
End Date	Enter the end date or enter past this field to default to the current date.
Record ID	Enter a record id . The record ID will be determined by the file type selected, for SRN - SERINDEX the vehicle serial number should be entered in this field. Note: This is not a mandatory field.
Purge Printed Records (Y/N)	Enter Y for Yes to purge printed records or enter N for No not to purge printed records.
Correct (Y/N)	Enter Y for Yes if the criteria entered are correct or N for No if the information is not correct and needs modifying.

Enter the required **printer** details and the report will print as displayed in the following example:

Note: The new equate *MAINT.CODE.UPD* will display on the report if there have been a change made to that vehicle's *Model Maint Code* field in either **3040 – Vehicle Information**, or  **Vehicle Information**.

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07/12/11		Audit File Report - Main store							6230	
09:45:21									Page	1
Typ	File Id	Date	Time	User	Str	Port	Exec	Field Desc	Old Value	New Value

SRN	6H8VTK69MWL263206	07/12/11	09:35	jb	320	30	3040	MAINT.CODE	GM00277	GM00363
								INFMDIA.LAST.DA	19/05/10	07/12/11
								MAINT.CODE.UPD	MANUAL.	AUTO
SRN	6H8VTK69MWL263206	07/12/11	09:41	jb	320	30	3040	MAINT.CODE	GM00363	GM00278
								MAINT.CODE.UPD	AUTO	MANUAL
SRN	6H8VTK69MWL263206	07/12/11	09:44	jb	320	30	3040	MAINT.CODE	GM00278	GM00280
								MAINT.CODE.UPD	MANUAL	MANUAL.

The AUTO indicates that the VINLINK update process has automatically changed the model maintenance code. The MANUAL indicates that the model maintenance code was manually overridden by a user.

Benefits

This new equate will allow the user to identify if the *Model Maintenance Code* field in Vehicle Information has been updated through the VINLINK update process or if it has been manually overridden.