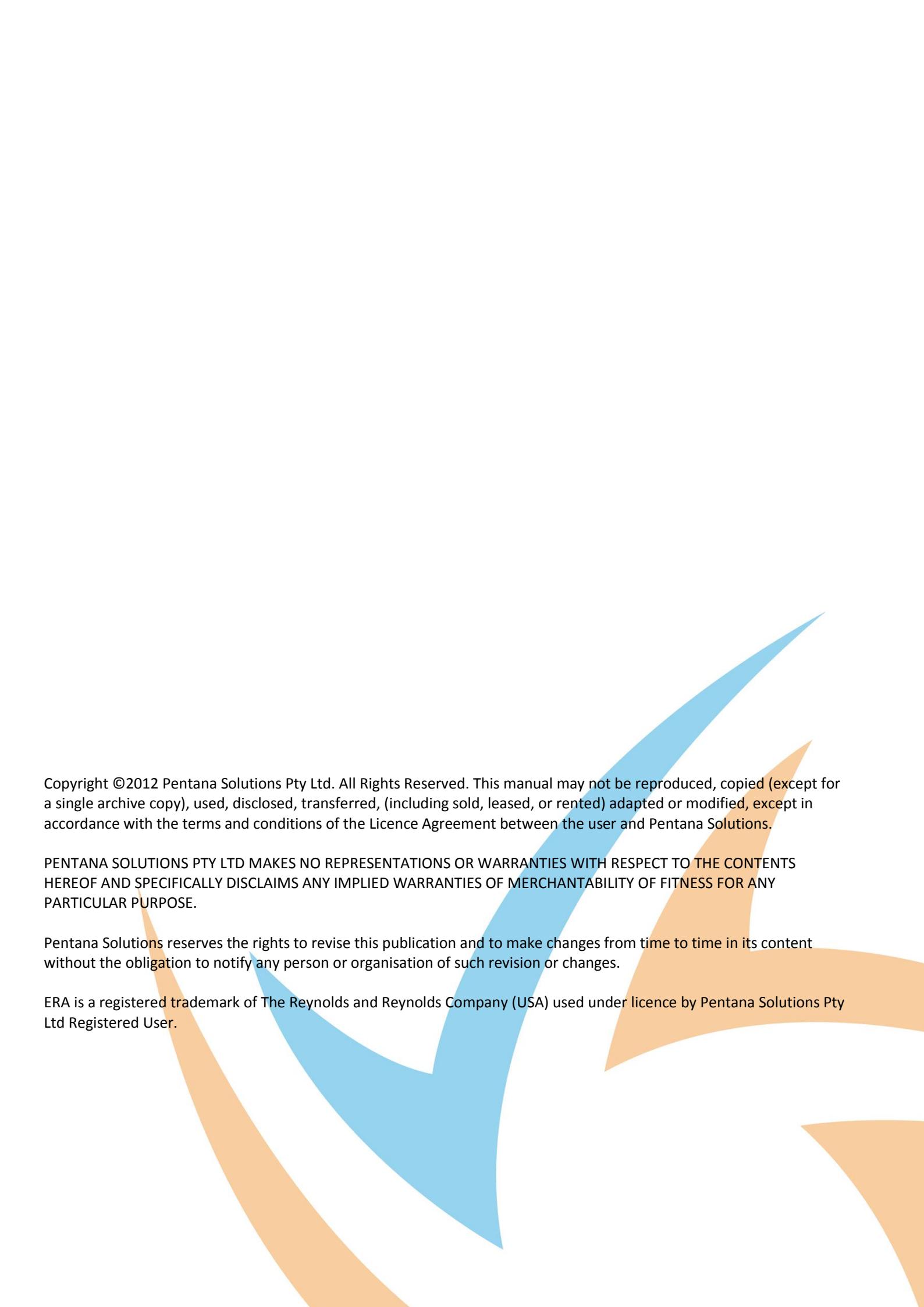




v9 Release General Manual



Copyright ©2012 Pentana Solutions Pty Ltd. All Rights Reserved. This manual may not be reproduced, copied (except for a single archive copy), used, disclosed, transferred, (including sold, leased, or rented) adapted or modified, except in accordance with the terms and conditions of the Licence Agreement between the user and Pentana Solutions.

PENTANA SOLUTIONS PTY LTD MAKES NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE CONTENTS HEREOF AND SPECIFICALLY DISCLAIMS ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR ANY PARTICULAR PURPOSE.

Pentana Solutions reserves the rights to revise this publication and to make changes from time to time in its content without the obligation to notify any person or organisation of such revision or changes.

ERA is a registered trademark of The Reynolds and Reynolds Company (USA) used under licence by Pentana Solutions Pty Ltd Registered User.

Table of Contents

ERAnet – New Support option	1
0556 – Entity Master	3
6230 – Print Audit File Report – MAINT.CODE.UPD.....	7

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

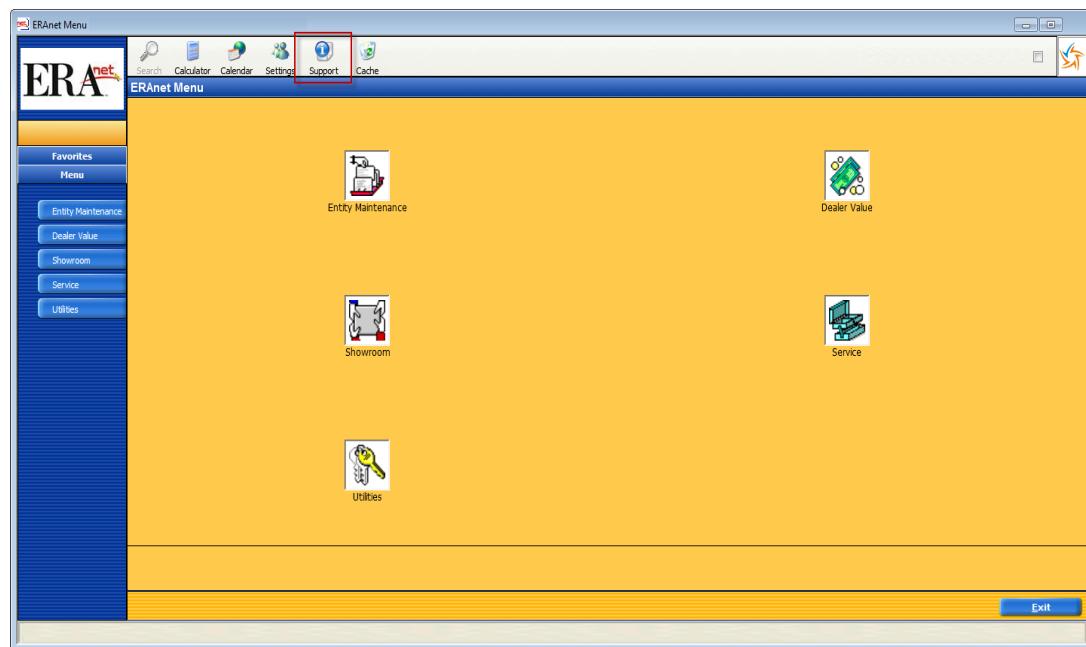
The **DocuLink**  button accessed a web site that is no longer functional. The **Support**  button provides access to timely and relevant end-user support.

Screens

 Support

The Process

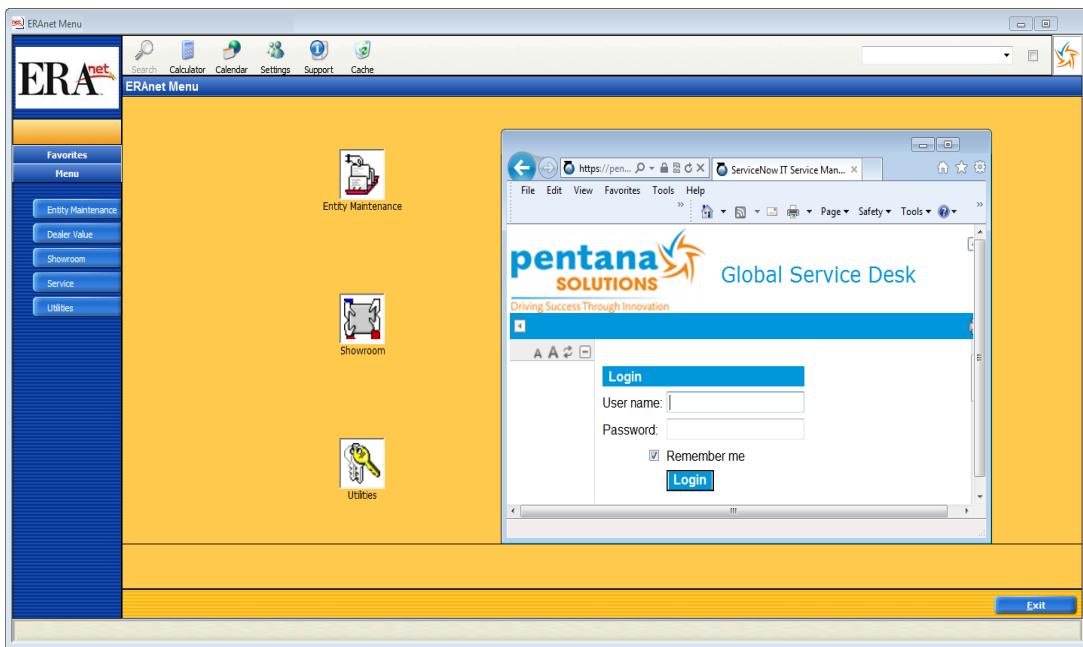
Select **ERAnet Menu** and the following screen will be displayed:



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 

ERAnet V9



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

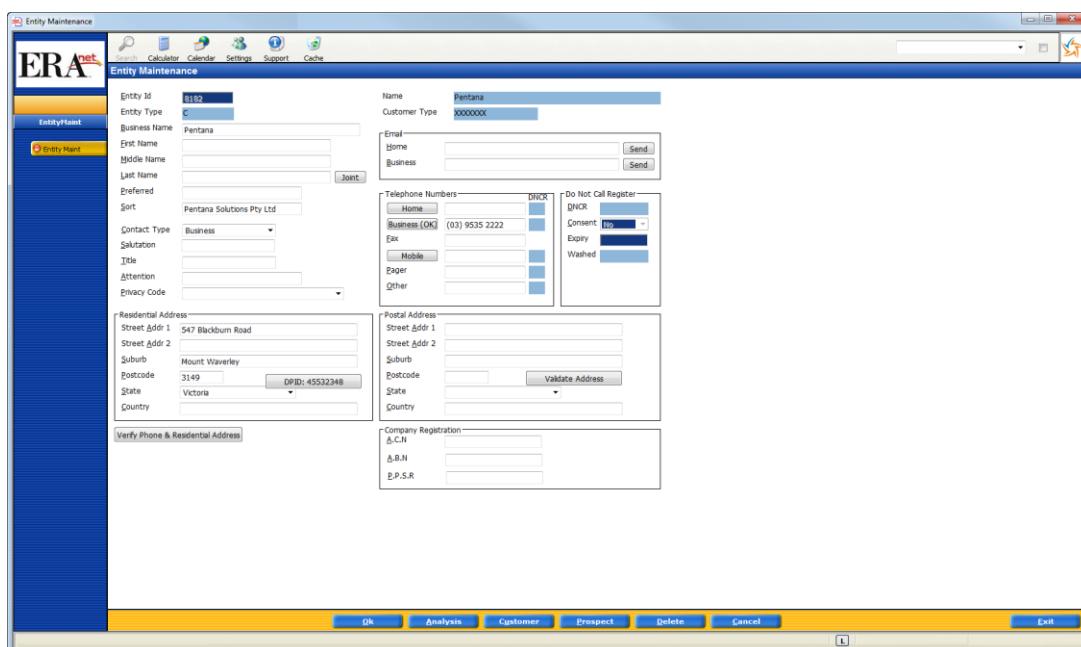
This option will only display if you have the contact type setup as B for Business and you have inputted a Business onto the entity. Additional fields have been added to ensure we have the ABN, ACN & PPS numbers recorded against an entity. Search functionality will also be added to search for these numbers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

ERAnet V9

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:



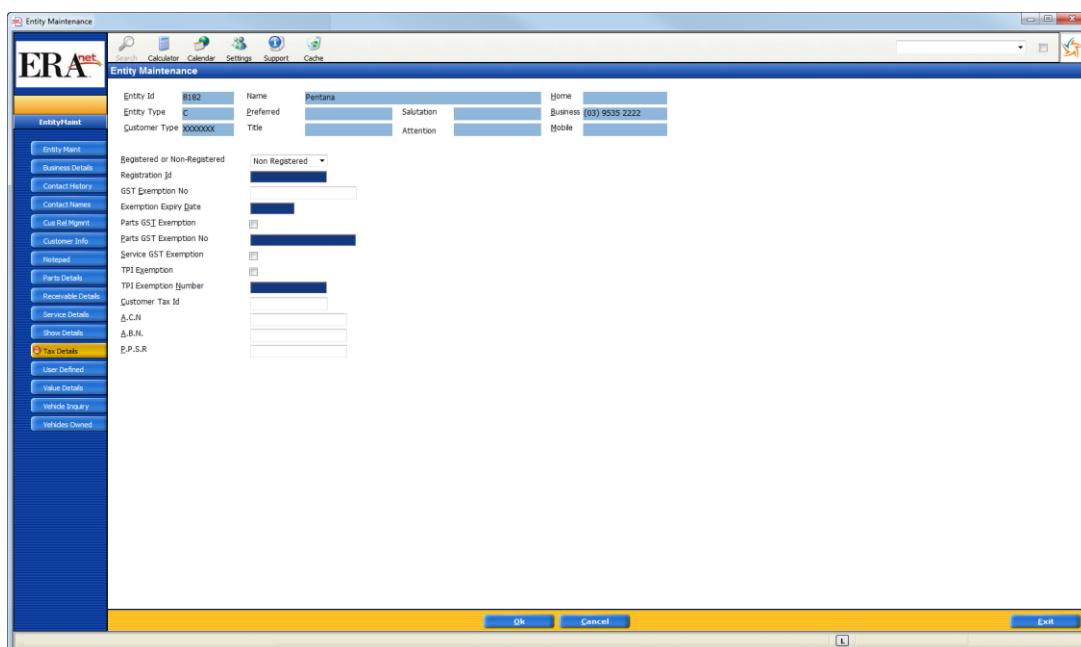
The screenshot shows the Entity Maintenance screen for Pentana Solutions Pty Ltd. The Entity Id is 8182, Entity Type is Business, and Customer Type is X00000X. The Business Name is Pentana. The contact type is Business. The address is 547 Blackburn Road, Mount Waverley, Victoria, 3149, with a DPID of 45532348. The telephone number is (03) 9535 2222. The postal address is the same as the residential address. The company registration details are A.C.N., A.B.N., and P.P.S.R. The screen includes buttons for Ok, Analysis, Customer, Prospect, Delete, Cancel, and Exit.

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:

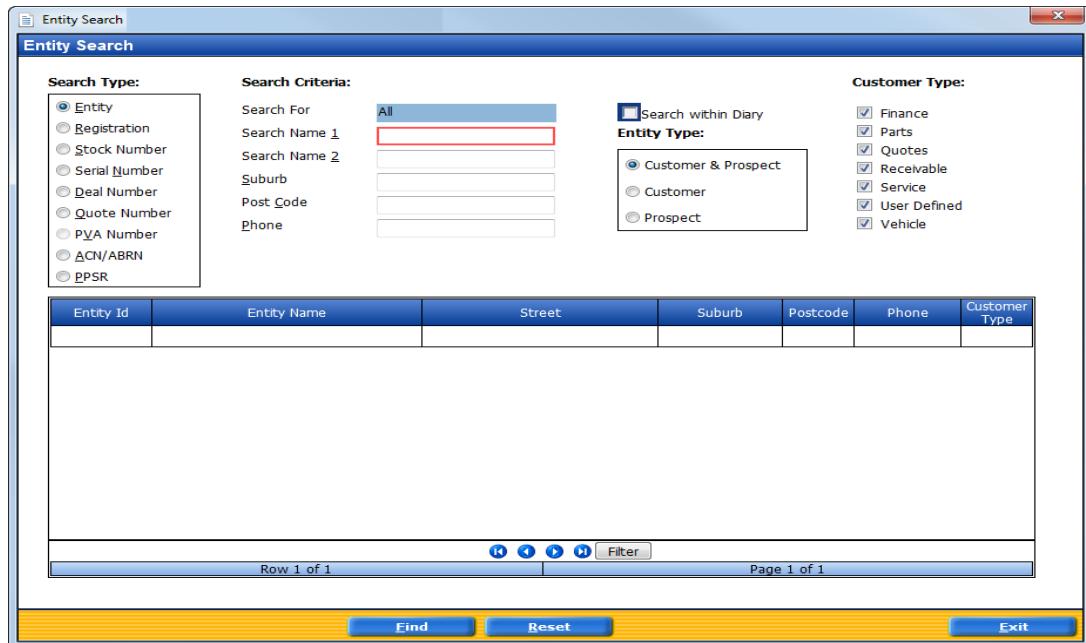
Select the **Customer** option from the action bar followed by the **Tax Details** option from the navigation bar and the following screen will be displayed:



The screenshot shows the Entity Maintenance screen for Pentana Solutions Pty Ltd. The Entity Id is 8182, Entity Type is Business, and Customer Type is X00000X. The contact type is Business. The address is 547 Blackburn Road, Mount Waverley, Victoria, 3149, with a DPID of 45532348. The telephone number is (03) 9535 2222. The postal address is the same as the residential address. The company registration details are A.C.N., A.B.N., and P.P.S.R. The screen includes buttons for Ok, Cancel, and Exit. The navigation bar shows the Tax Details option is selected.

General Manual

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



The Entity Search window displays search criteria and a results table. The search criteria include:

- Search Type: Entity (selected)
- Search For: All
- Search Name 1: (empty)
- Search Name 2: (empty)
- Suburb: (empty)
- Post Code: (empty)
- Phone: (empty)

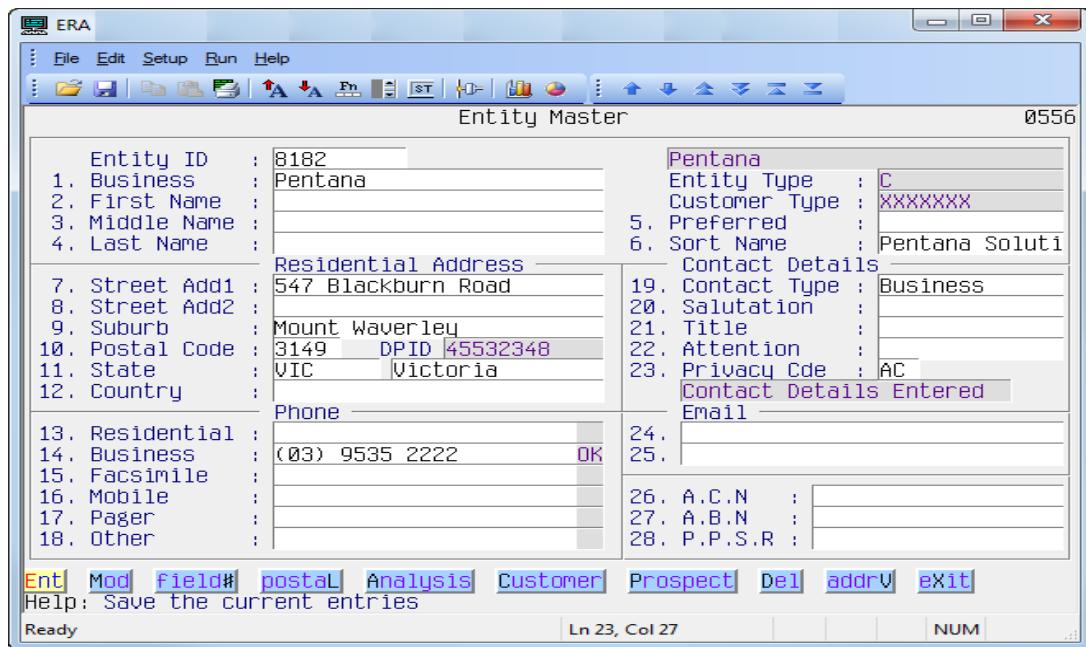
The results table has columns: Entity Id, Entity Name, Street, Suburb, Postcode, Phone, and Customer Type. The table is currently empty, showing Row 1 of 1 and Page 1 of 1.

Customer Type checkboxes are checked for Finance, Parts, Quotes, Receivable, Service, User Defined, and Vehicle.

Entity Type checkboxes are checked for Customer & Prospect, Customer, and Prospect.

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:



The Entity Master screen shows a business record with Entity ID 8182. The record includes fields for Business Name (Pentana), Residential Address (547 Blackburn Road, Mount Waverley, VIC 3149, DPID 45532348), Phone number ((03) 9535 2222), and Contact Details (Business, AC). The screen also shows fields 26, 27, and 28, which are new fields for A.C.N, A.B.N, and P.P.S.R respectively.

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:

ERAnet V9

The screenshot shows the ERA Entity Master screen. The title bar says 'Entity Master' and '0556'. The menu bar includes 'File', 'Edit', 'Setup', 'Run', 'Help'. The toolbar has icons for file operations. The main area has two columns of input fields. The left column contains fields for Entity ID (8182), Business (Pentana), First Name, Middle Name, Last Name, and Tax Details (13 sub-fields). The right column contains fields for Entity Type (C), Customer Type (XXXXXXX), Preferred, and Sort Name (Pentana Solutions). Below the fields is a command bar with 'Enter', 'Modify', 'Field', and 'Exit', and a help message: 'Help: 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 new 'Search Criteria' section. The title bar says 'Entity Master' and '0556'. The menu bar and toolbar are the same as the previous screenshot. The main area now includes a 'Search Criteria' section with fields for 1. Search For (All), 2. Search Name 1, 3. Search Name 2, 4. Suburb, 5. Postcode, 6. Phone, 7. Entity Type (CP), 8. Customer Type, 9. Rego#, 10. Stock#, 11. Serial#, 12. Deal Number, 13. Quote Number. To the right of these are fields for 14. ACN or ABRN (123-) and 15. PPSR. Below the search section is a help message: 'Help: 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

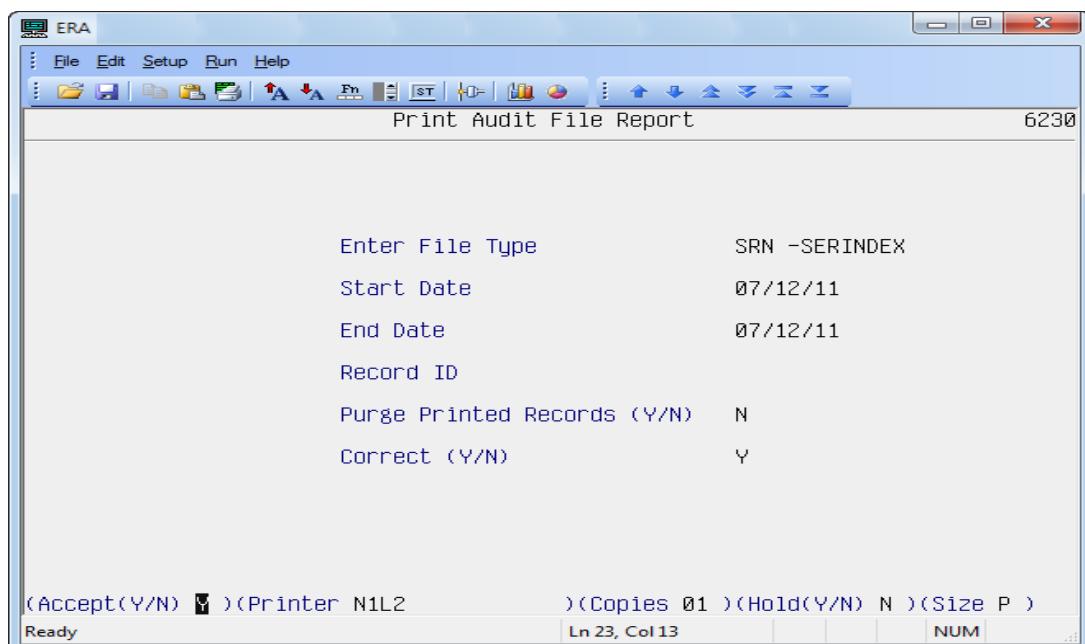
This change was made to enhance the existing audit file report.

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*.

ERAnet V9

07/12/11 09:45:21	Audit File Report - Main store							6230		
								Page	1	
<hr/>										
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 INFMDIA.LAST.DA MAINT.CODE.UPD	GM00277 19/05/10 MANUAL.	GM00363 07/12/11 AUTO
SRN	6H8VTK69MWL263206	07/12/11	09:41	jb	320	30	3040	MAINT.CODE MAINT.CODE.UPD	GM00363 AUTO	GM00278 MANUAL
SRN	6H8VTK69MWL263206	07/12/11	09:44	jb	320	30	3040	MAINT.CODE MAINT.CODE.UPD	GM00278 MANUAL	GM00280 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.