V9 Release Vehicle Manual

pentana SOLUTIONS
Driving Success Through Innovation

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ERAnet – 98 "AF" Miscellaneous option

Enhancement

Overview

Currently you can have a 99 accessory code to add miscellaneous accessories to a deal which would then flow through to accounting as a DA accessory. We have now added the ability to have a 98 accessory code that is defined as an Aftermarket code so aftermarket items can be added to a deal and then flow through to accounting as an AF aftermarket item.

Why

This change was made at the request of the Customer Development Committee (CDC) to enhance existing functionality.

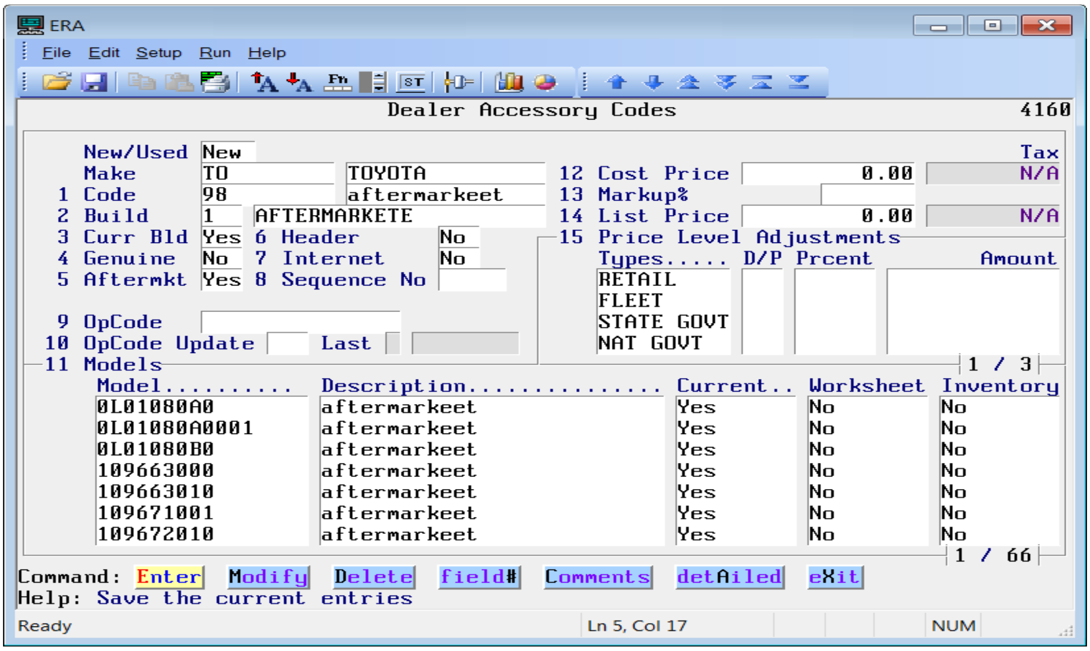
Screens

4160 - Dealer Accessory Codes

 - Vehicle Advisor

The Setup

Select ***4160 – Dealer Accessory Codes*** and the following screen will display:

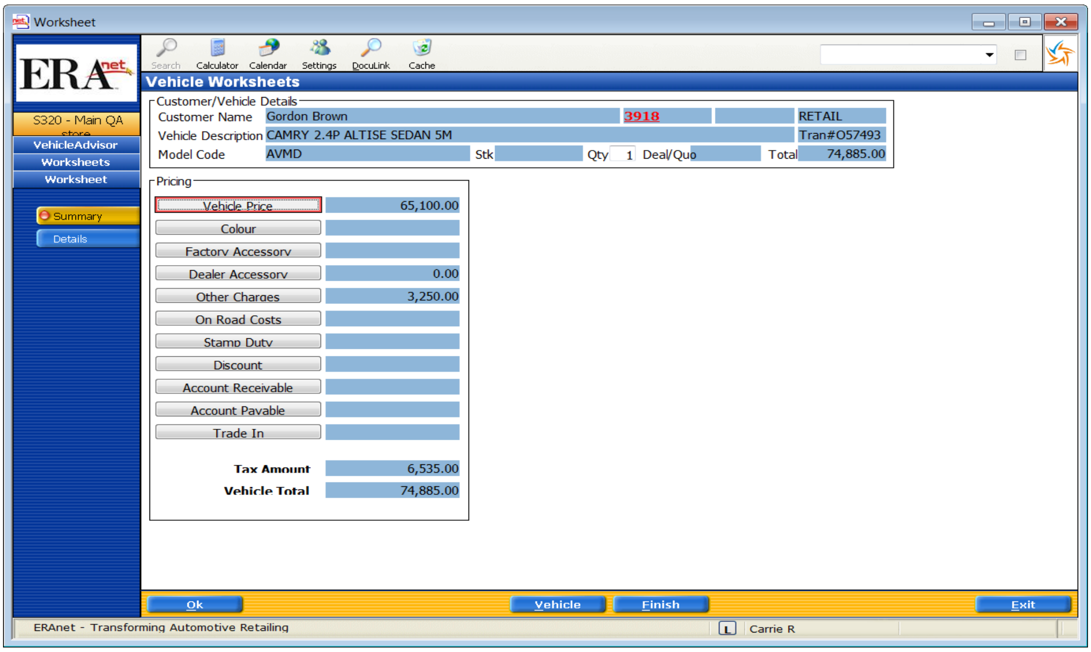


New/Used	Enter Vehicle type; enter '**N**'ew or '**U**'sed.
Make	Enter Vehicle **Make.**
1. Code	Enter **98** and select **Enter** and Enter a description for this new code.
2. Build	Enter a **build/model code** or <return> to **create a new build** or select a build from the /=Lookup.
3. Curr Bld	Enter '**Yes**' or '**No**'.
4. Genuine Accessory	Enter '**Yes**' or '**No**'.
5. Aftermarket Accessory	Enter '**Yes**' or '**No**'.
11. Models	Enter vehicle model or "/xxx" for a partial number search

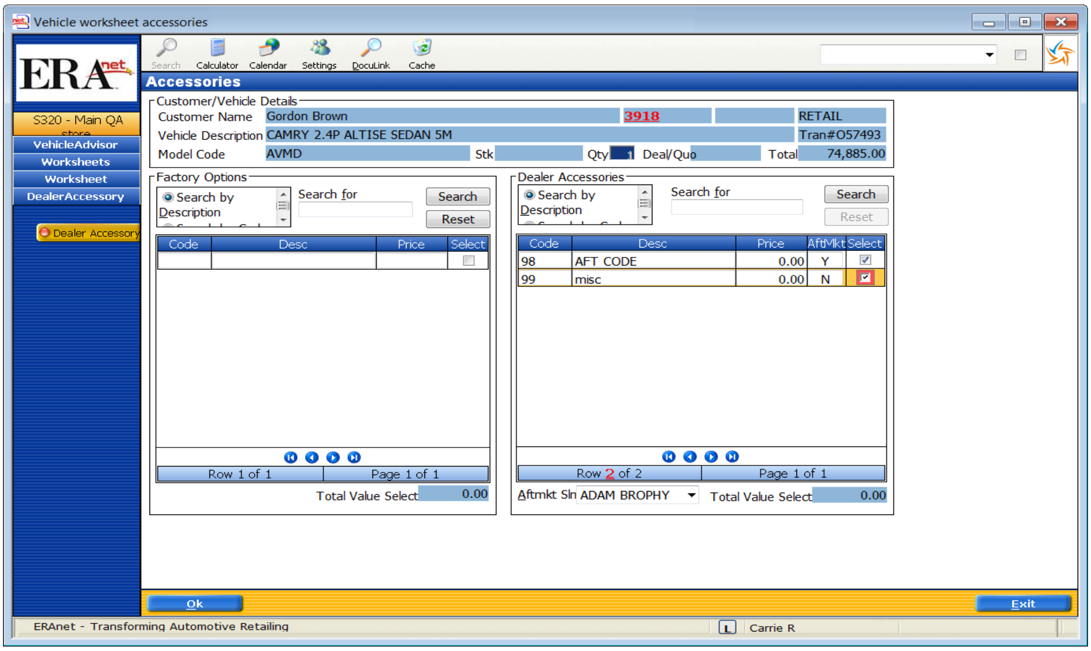
Note: If question 5 is set to Yes the aftermarket items will print under the header from Aftermarket Accessories. Once the dealer enters all the required information select "***Enter***" from the command line to save the changes.

The Process

Create a Vehicle Worksheet as per existing functionality:

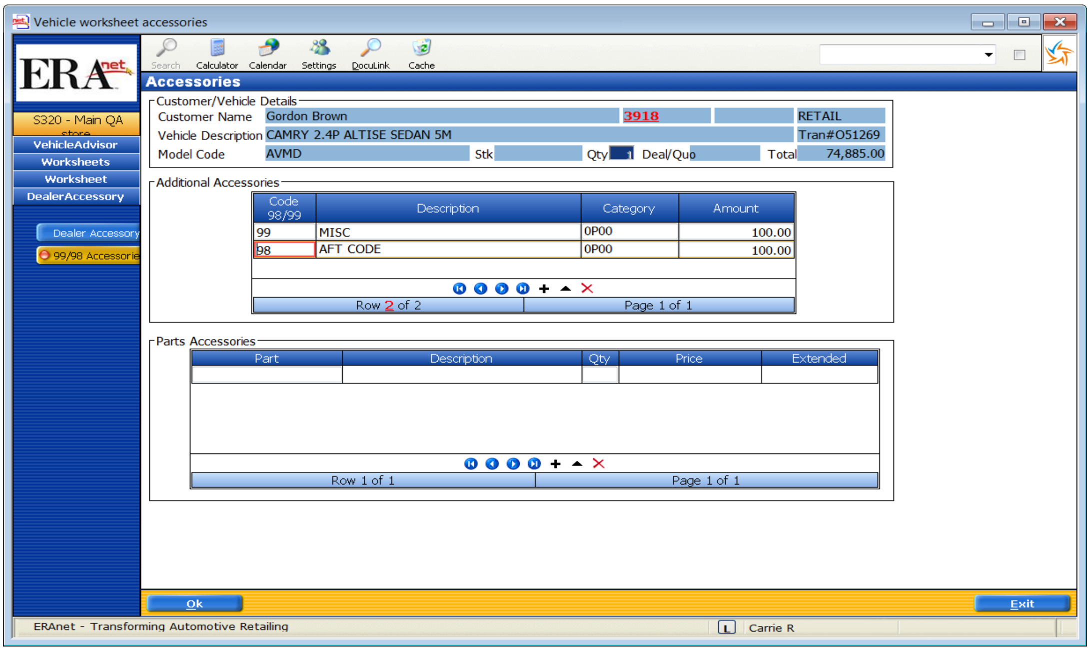


Select the option to add Dealer Accessories and the following screen will appear:



Note: In Dealer Accessory page you will see the new 98 option (this will be dependent on whether the salesman creating the worksheet has access to these accessories in 4522, option 13).

Click ***ok*** to continue, and the following screen will appear:



Note: A new column header has been added in the above table (Code 98/99). If the 98 code is setup as an Aftermarket Accessory via 4160, the option will display under the Aftermarket Navigation option.
In the Worksheet the 98 accessory will also display under type AF.

As per existing functionality you can add or delete miscellaneous codes, you now must input a Category Code.

Benefits

This feature will allow the user the ability to add Misc accessories under the heading of Dealer Accessories and Aftermarket Accessories separately on a worksheet. This will also enable the dealer to accuratley report on all sales that are done by aftermarket sales people.

ERAnet – Deal Reversal reasons

Enhancement

Overview

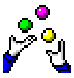
A new functionality has been created to record a reason for reversing a deal. This can then be reported on in report generator.

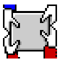
Why

This change was made as a Request for Development (RFD) to enhance the existing functionality.

Screens

 - ERAnet Admin

 - ERAnet Miscellaneous

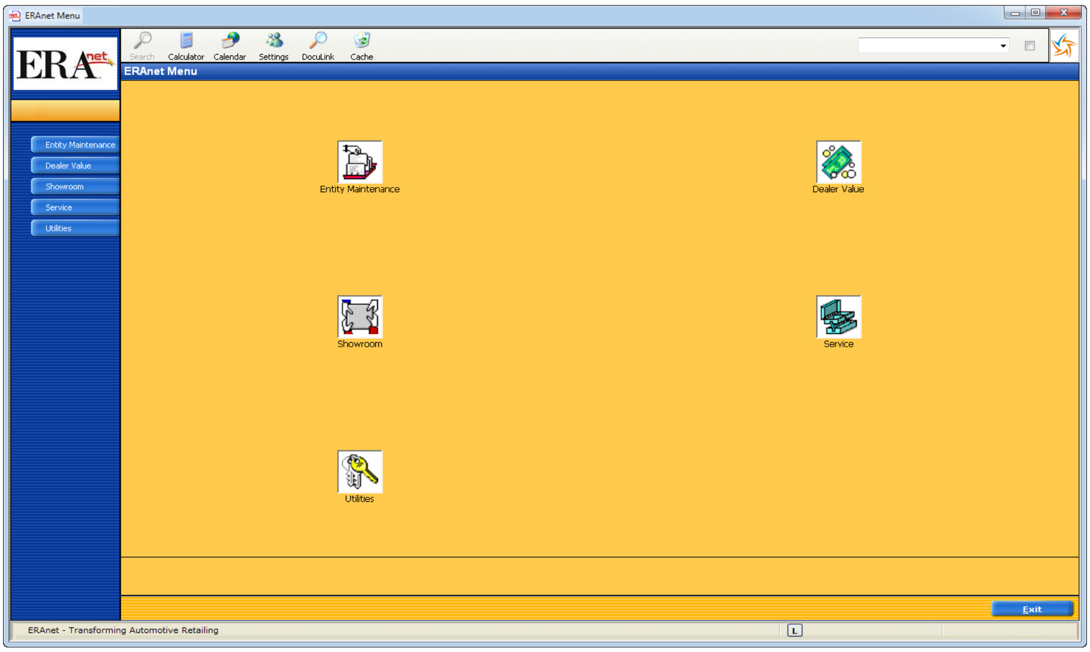
 - Showroom

 - Vehicle Advisor

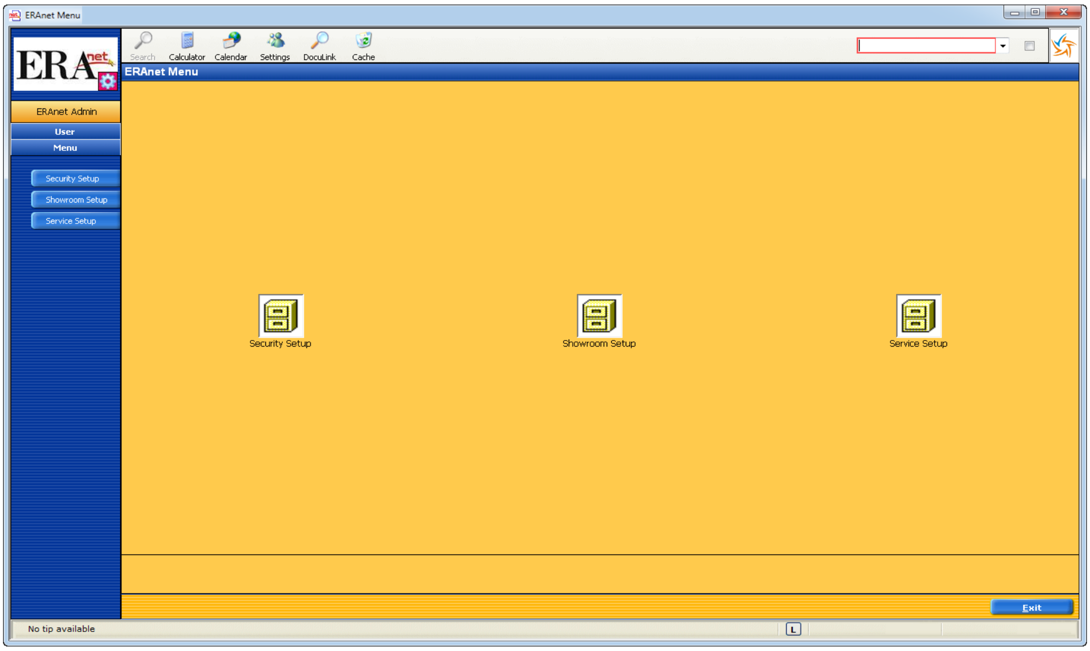
6913 – Reportwriter

The Setup

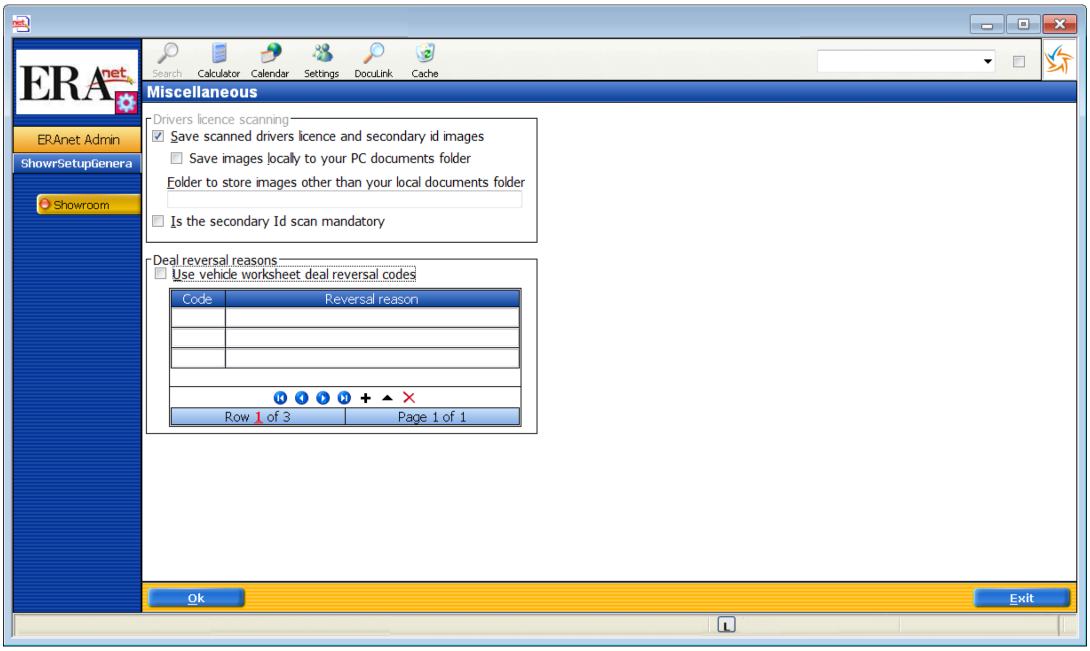
The following setup will need to be checked and updated prior to using the new Deal Reversal Reasons option. Once the user has logged into ERAnet, the following screen will be displayed:



Right click on the ***Store Number*** link located on the top left corner of the screen and select the ***ERAnet Admin*** option from the list and the following screen will be displayed:

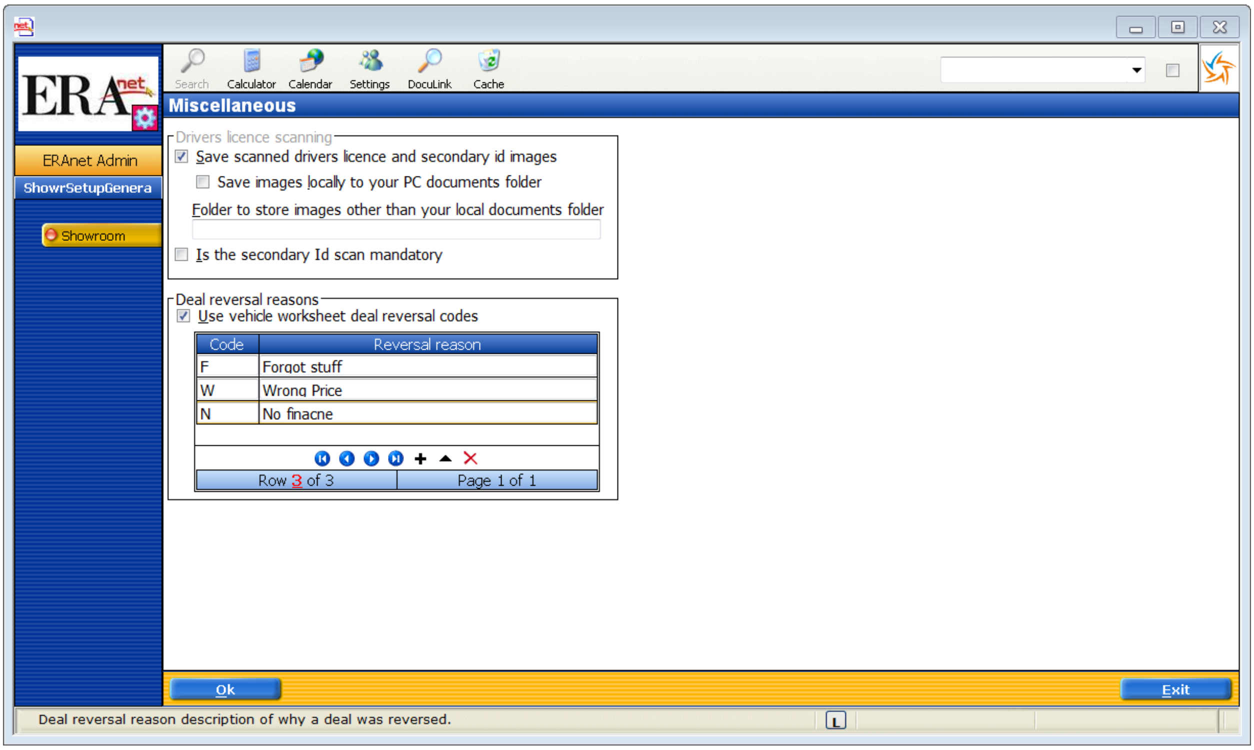


Select ***Showroom Setup***, followed by ***Miscellaneous*** and the following screen will be displayed:



The user will need to ensure that the ***Deal reversal reasons*** check box is ticked as displayed in the following example:

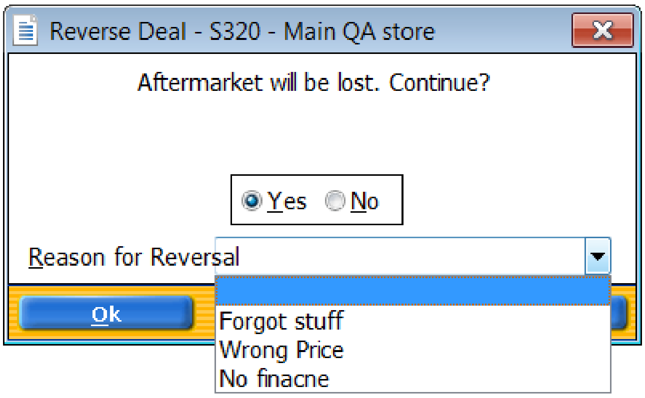
Once the box is checked, you can then enter a list of deal reversal codes and reason descriptions which will then pop up when you actually reverse a deal.



The Process

Create a deal as per existing functionality.

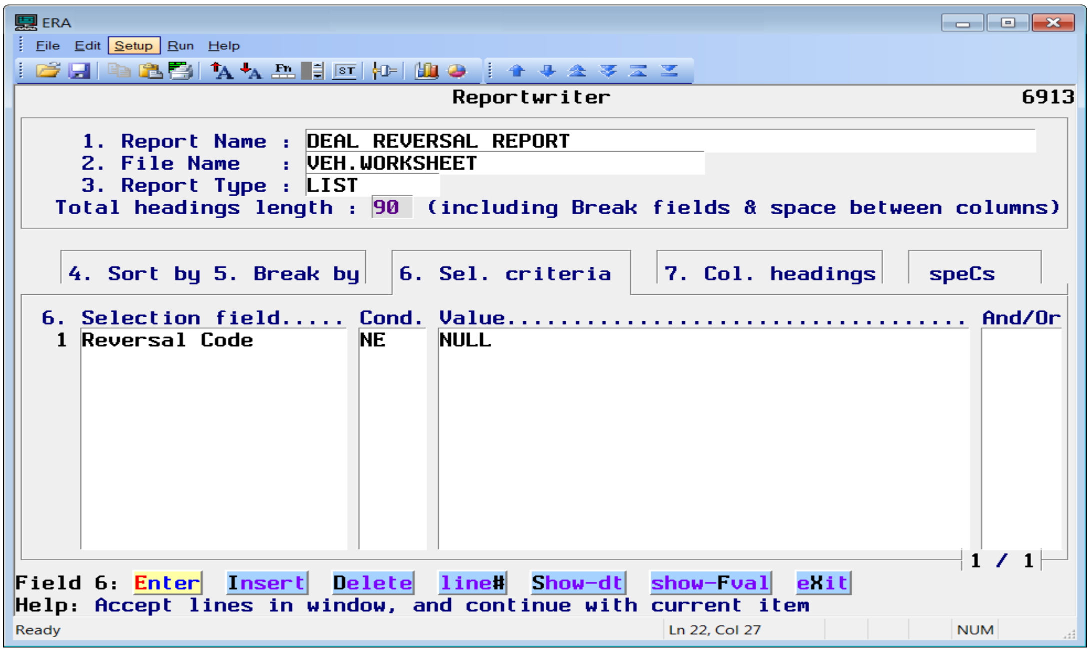
When reversing a deal a new popup will appear, as per the following example:

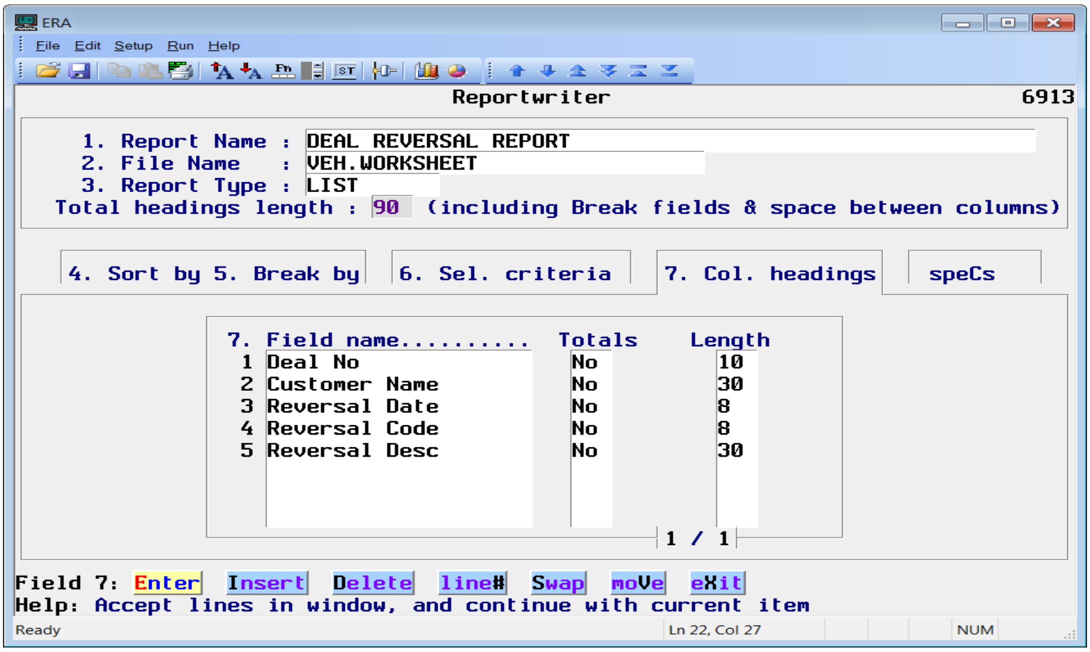


Reporting on the Information:

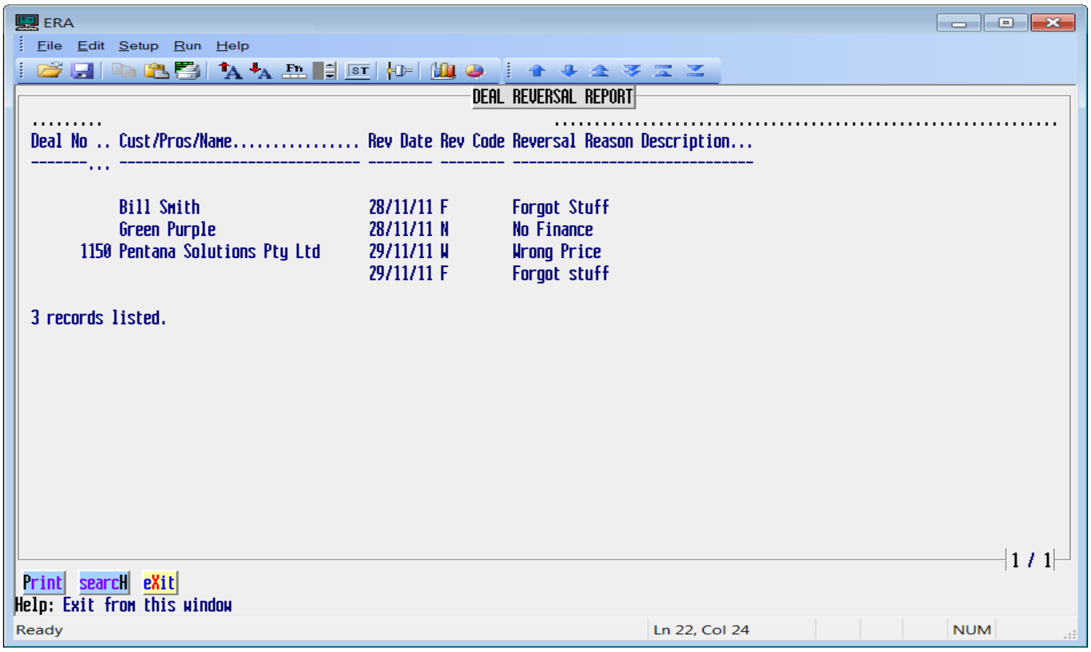
3 new dictionaries have been created to use in report generator for date, code and description of the reversal. Example report generator screens below:

(Only select the worksheets with a reversal code. The “Reversal Date”, “Reversal Code” and “Reversal Desc” are the 3 new fields created for this task)





Report Output:



Benefits:

This functionality will record a reason for reversing a deal. This can then be reported on in report generator.

ERAnet – Fusion Finance Accelerator Integration

Enhancement

Overview

When a deal is created via ERAnet, the Deal information is sent to Fusion Finance Accelerator's ***Staging area*** stamped with each Dealership unique Department, Location and Retail Sales for Finance tracking.

Why

This enhancement was developed to cater for multiple Department, Location and servers. Individual users of ERAnet and Fusion Finance Accelerator are matched for accurate Finance tracking.

Screens

4522 - Salesperson Maintenance
6210 - Maintain User Security
Vehicle Advisor
ERAnet Showroom

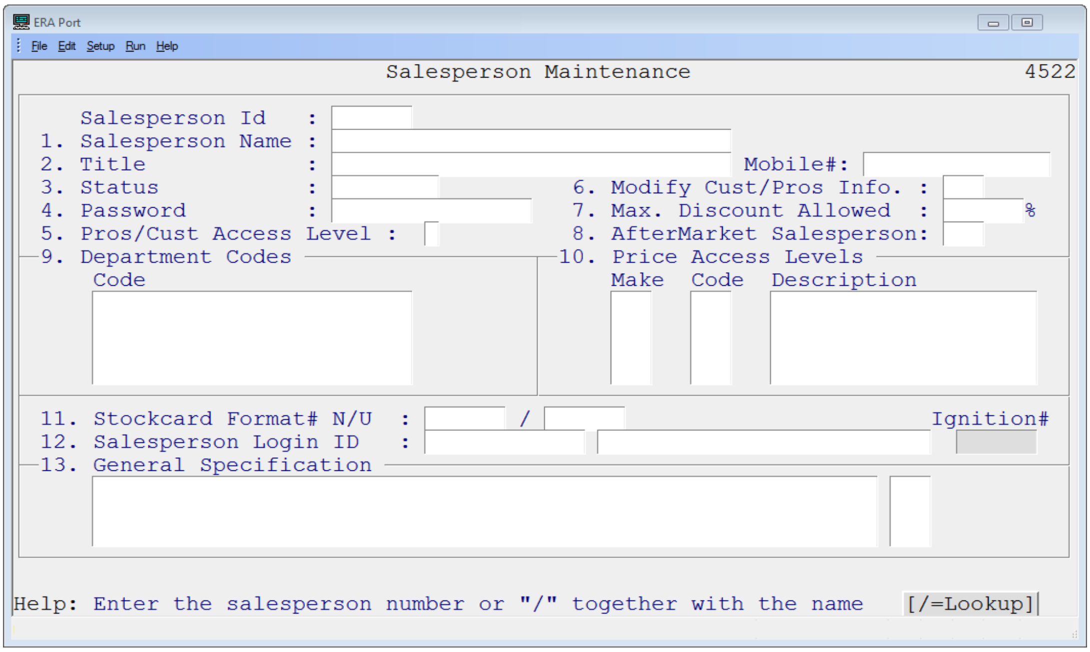
Minimum Requirements

Fusion Finance Accelerator
ERAnet Showroom
ERAlink

The Set Up

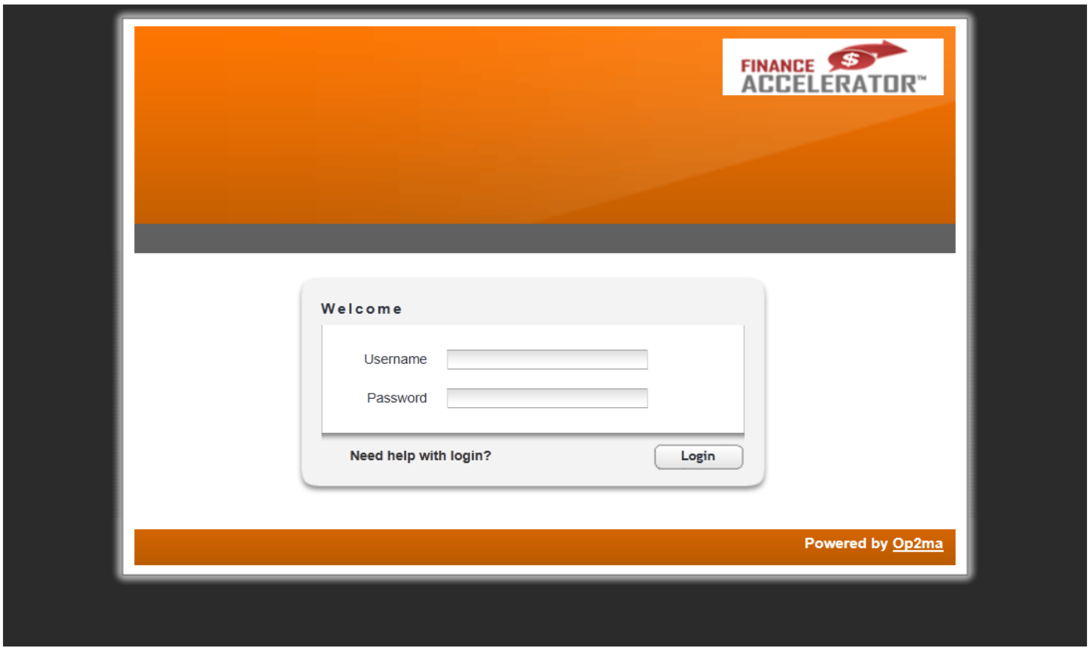
In ERA ***4522 - Salesperson Maintenance***, users of Fusion Finance Accelerator are required access to Departments sending deal information to Fusion. Department Codes are required for data matching.

Select ***4522 - Salesperson Maintenance*** and the following screen will be displayed:



9. Department Codes	Enter the required New and Used Department Code access for the individual user. **Note:** Department Codes represented here are required to *match* with ***Fusion Finance Accelerator***. Any inconsistency with Department codes between the ***user***, or ***Fusion Business Solutions*** will result in incorrect information in the ***Staging Area*** of Finance Accelerator.

Note: This current user set-up will require confirmation between the Dealership and Fusion Business Solutions prior to installation. Contact your Pentana Solutions Account Manager for more details: 03) 9535 2222.



Once ***4522 - Salesperson Maintenance*** has been confirmed, enter ***6210 - Maintain User Security.***

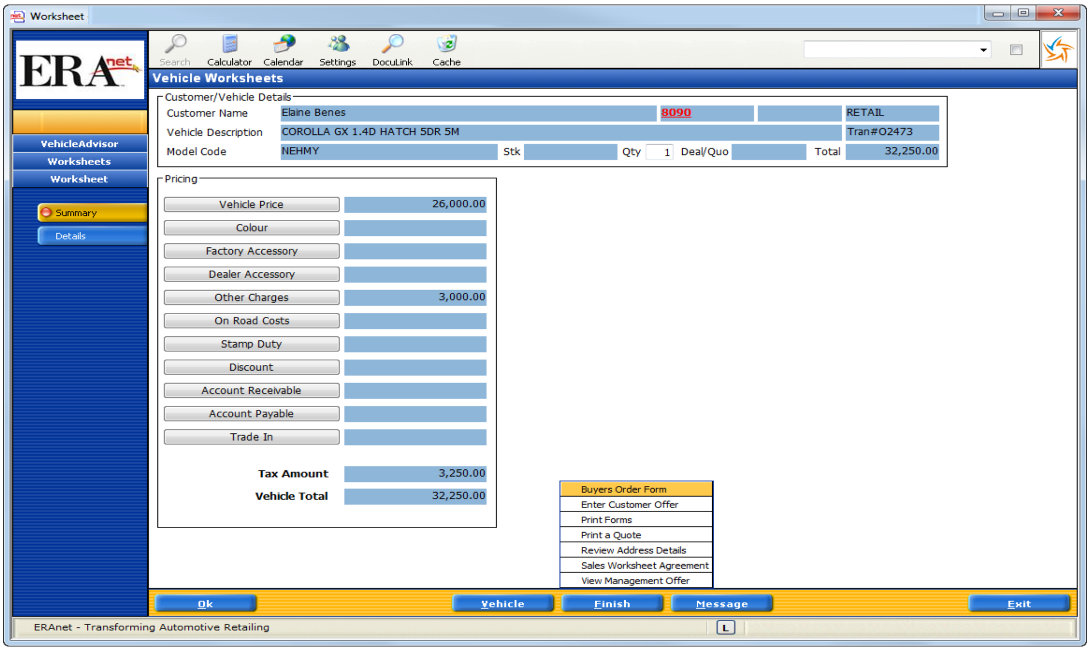
Note: Communicate with your current Systems Administrator for configuration of ***6210 - Maintain User Security*** OR Contact your Pentana Solutions Helpdesk for assistance: 03) 9535 2222

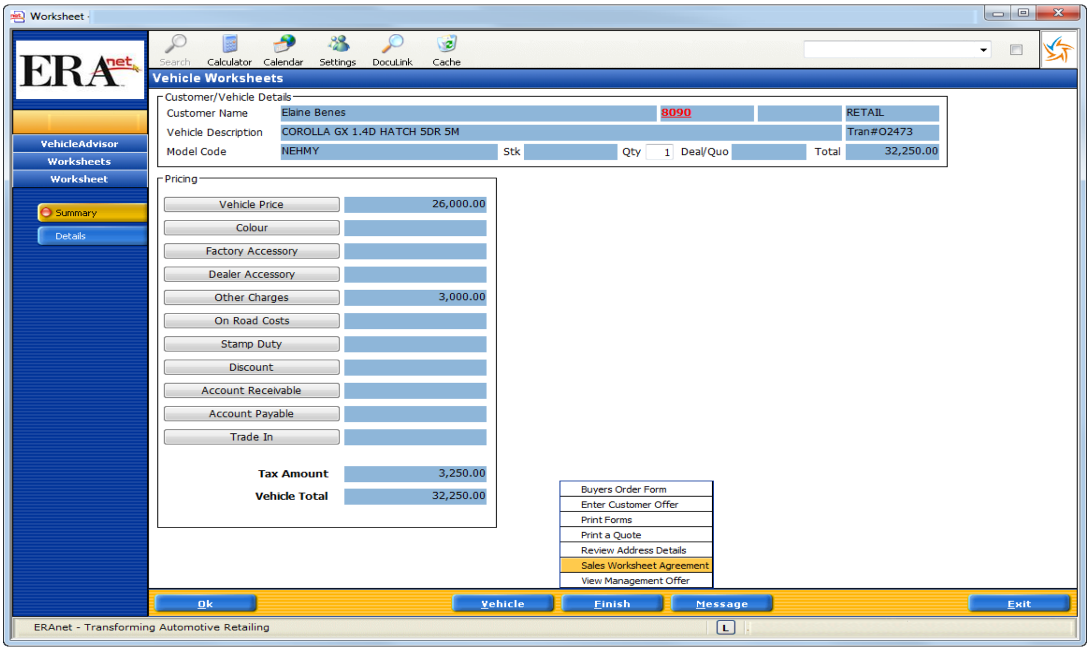
The Process

Information will be sent to Fusion Finance Accelerator using the following scenarios:

Scenario 1

Information will be sent to Fusion Finance Accelerator when a ***Buyers order Form*** is generated in ***ERAnet - Vehicle Advisor*** as displayed in the following screen:

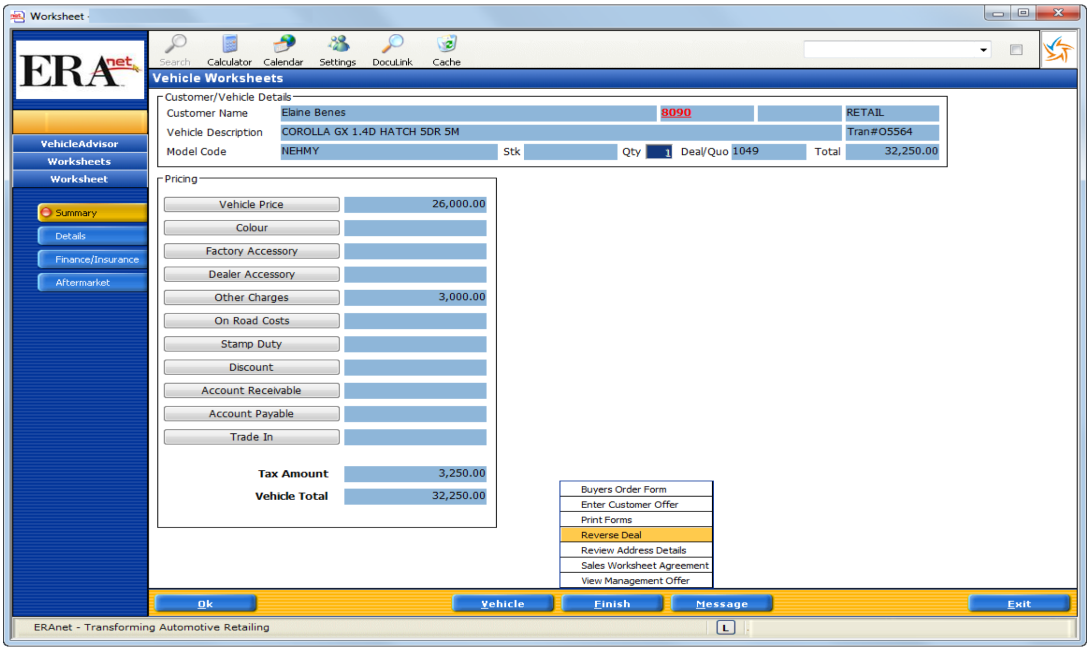




Note: Information will only be sent to Fusion Finance Accelerator once a ***Sales Worksheet*** is converted to a deal and Ok is selected.

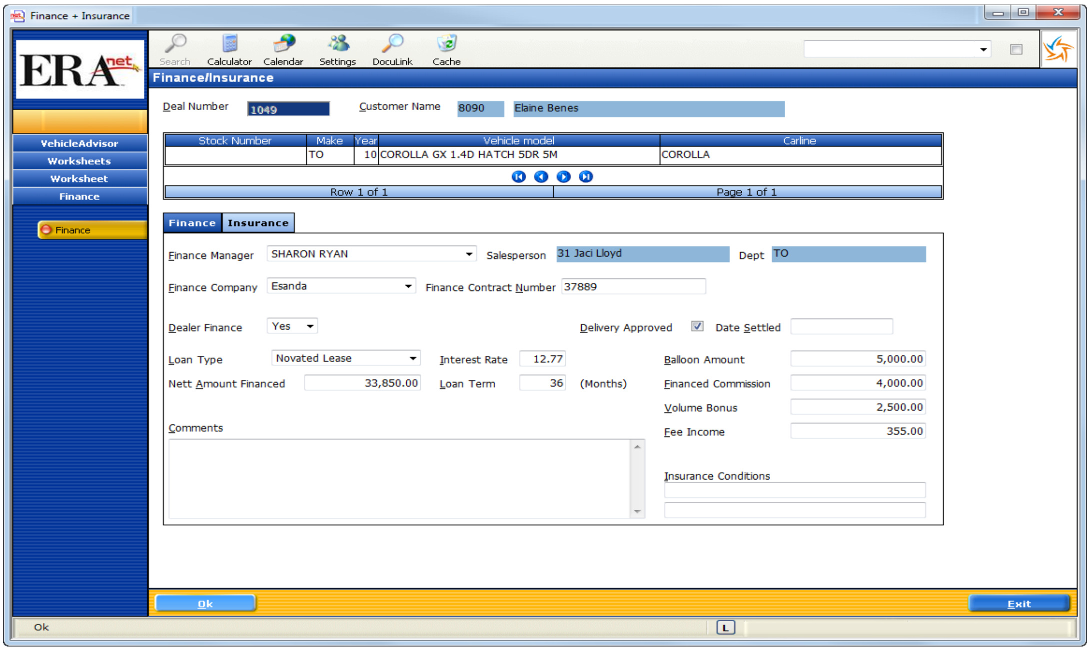
Scenario 3

Information will be sent to Fusion Finance Accelerator if deal's are *reversed* or modified as displayed in the following screen:



Scenario 4

Information will be sent to Fusion Finance Accelerator if information is added to ***Finance and Insurance*** as displayed in the following screen:



Benefits

Information will be sent directly to Fusion Finance Accelerator when a deal is ***created***, ***reversed***, or ***modified*** to save time with re-keying and ensure correct data is entered.

Activation Key

VEH-FUSION
ERANET-AFTMKT-FI

ERAnet – New Drivers Licence Scanner User Guide

Optional Software

Overview

ERAnet is now integrated with a Licence Scanner that allows users to scan licences and automatically import the licence data into Showroom Reception, Loan Car in Vehicle Advisor and the Service Loan Car System. New fields have been added to Showroom Reception, Loan Car in Vehicle Advisor and The Service Loan Car System to accommodate for the additional data.

Why

Driver's License Scanning has been integrated into ERAnet to enhance functionality in the product.

Screens

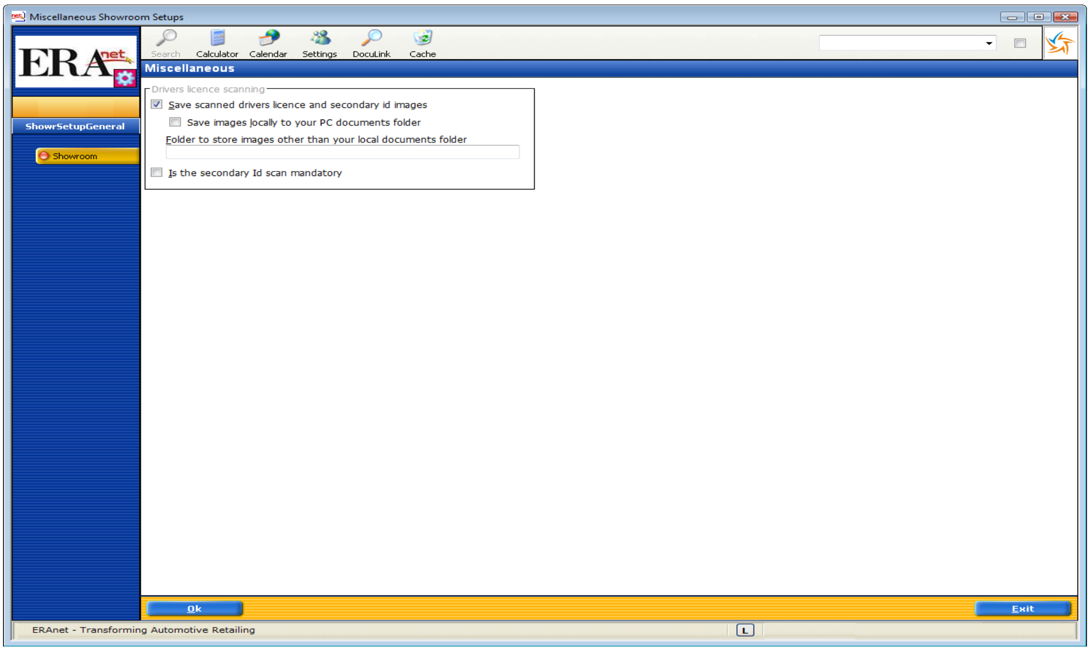
Miscellaneous
Loan Car System
Service
Showroom
Showroom Reception
Vehicle Advisor

The Setup

ERAnet

Upon logging into ERAnet Admin as per existing functionality, select ***Showroom Setup***, followed by ***Miscellaneous*** and the following screen will be displayed:

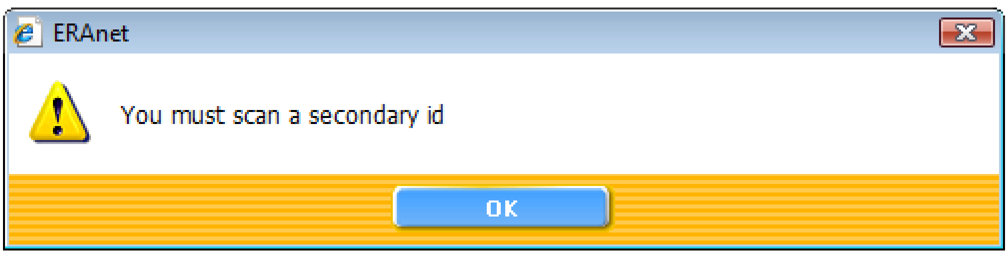
Note: If ***Miscellaneous*** is not on the menu it will need to be added through the profile setup. Contact your system administrator for assistance with this.



Drivers License Scanning

***Save scanned drivers licence and secondary id images*.**	Select this option to save the ***scanned drivers licence and secondary id*** images, un-checking this option will not save the images. Note: You will need to save the images in order to print them onto the Loan Car form if required.
Save images locally to your PC documents folder.	Select this option to store the scanned images to your local ***"Documents and settings"*** folder of the PC with the scanner connected to it and for the current user logged in. If the user un-checks this question, the user can enter the windows folder name in the next field.
Folder to store images other than your local documents folder	Enter folder ***(or DocuSmart IP address and folder)*** to store the scanned licence and secondary ID images.
Is the secondary Id scan mandatory	Select this option to allow the capture of the secondary id in the drivers licence popup to be mandatory. If the user un-checks this question the user can exit without a secondary ID scan. Note: This may be mandatory for some insurance companies.

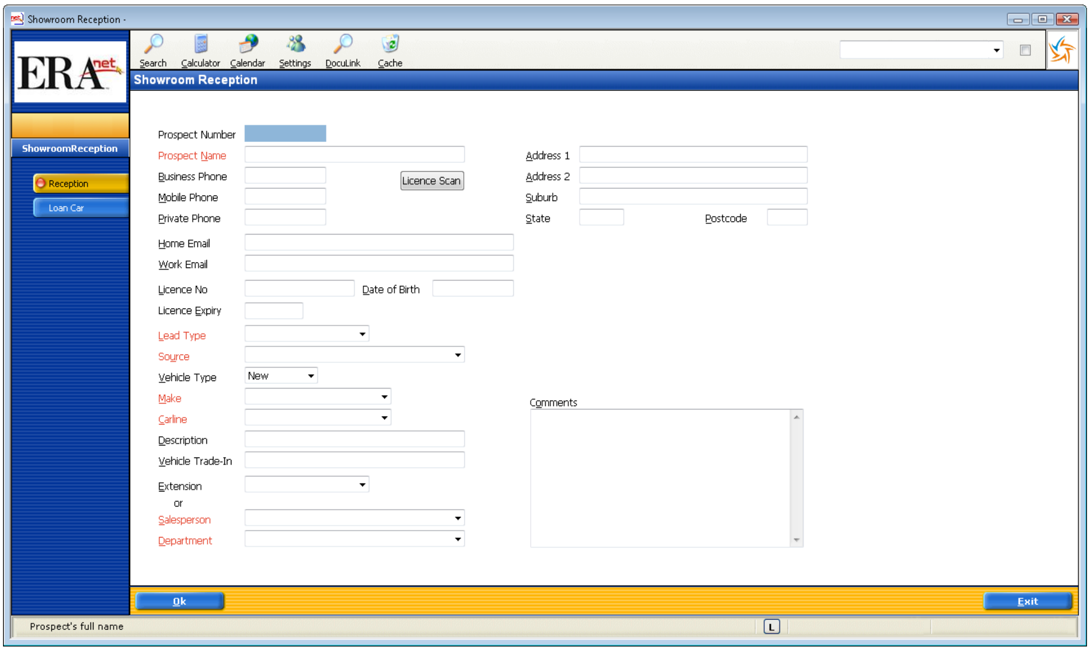
Note: If select **Is the secondary Id scan mandatory** option and the user exits without scanning the warning pop up message will be displayed:



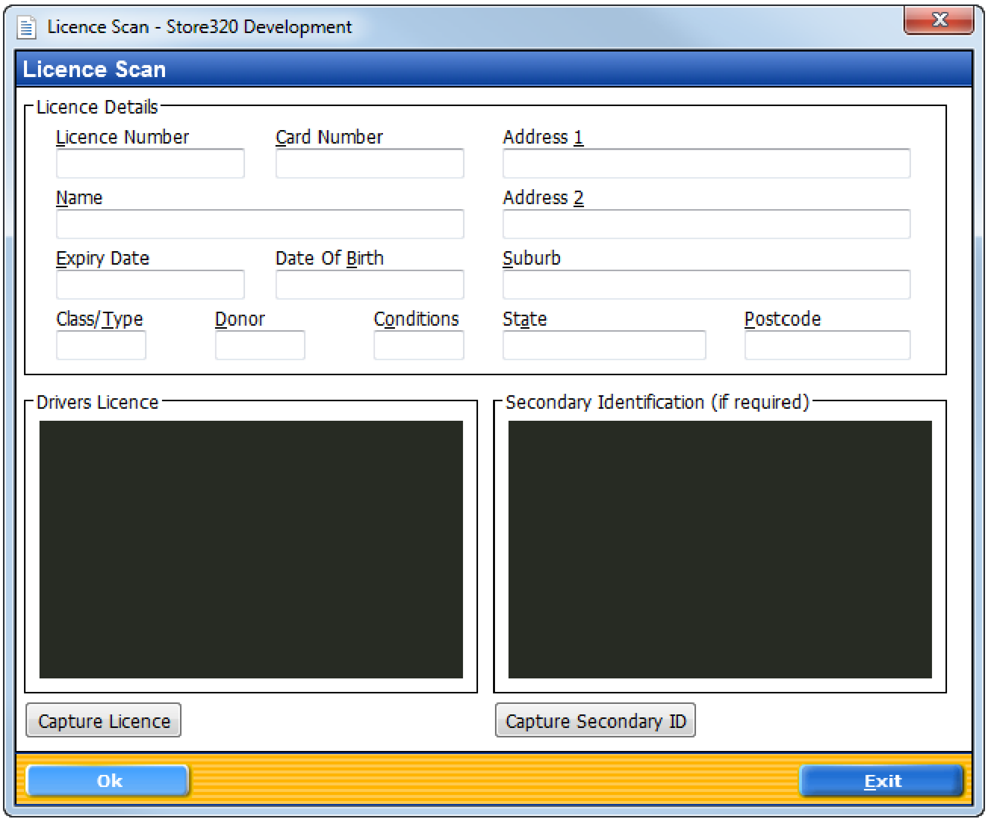
Once finished select **OK** at the action bar to save the record.

The Process

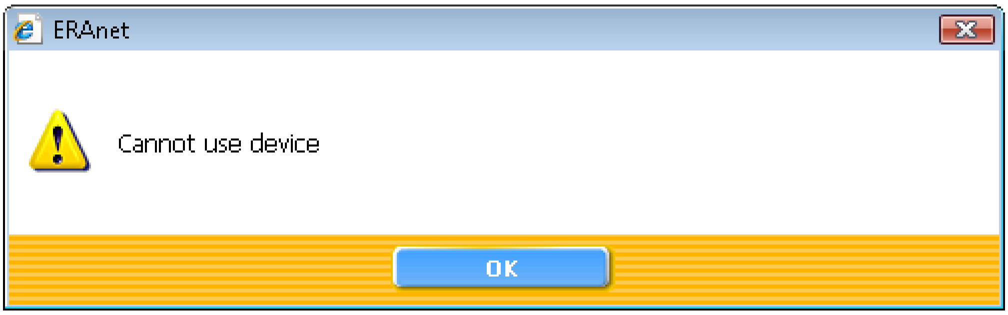
From the main menu, select ***Showroom***, then ***Showroom Reception*** and the following screen will be displayed:



Select the Licence Scan button and the following pop up screen will be displayed:

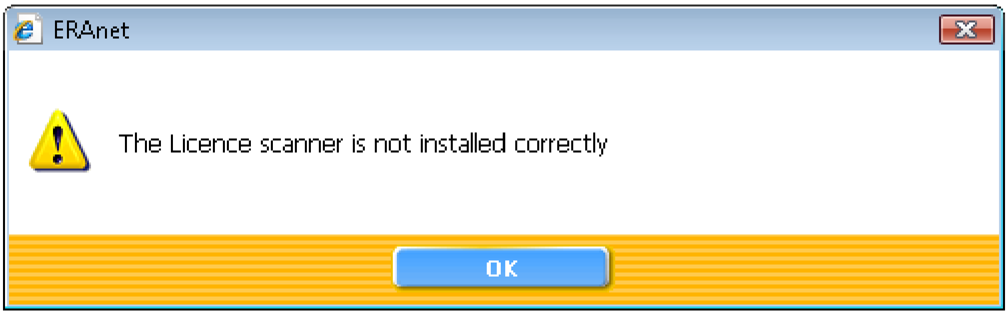


Note: If the scanner is not connected to the computer, the following pop up message will be displayed:



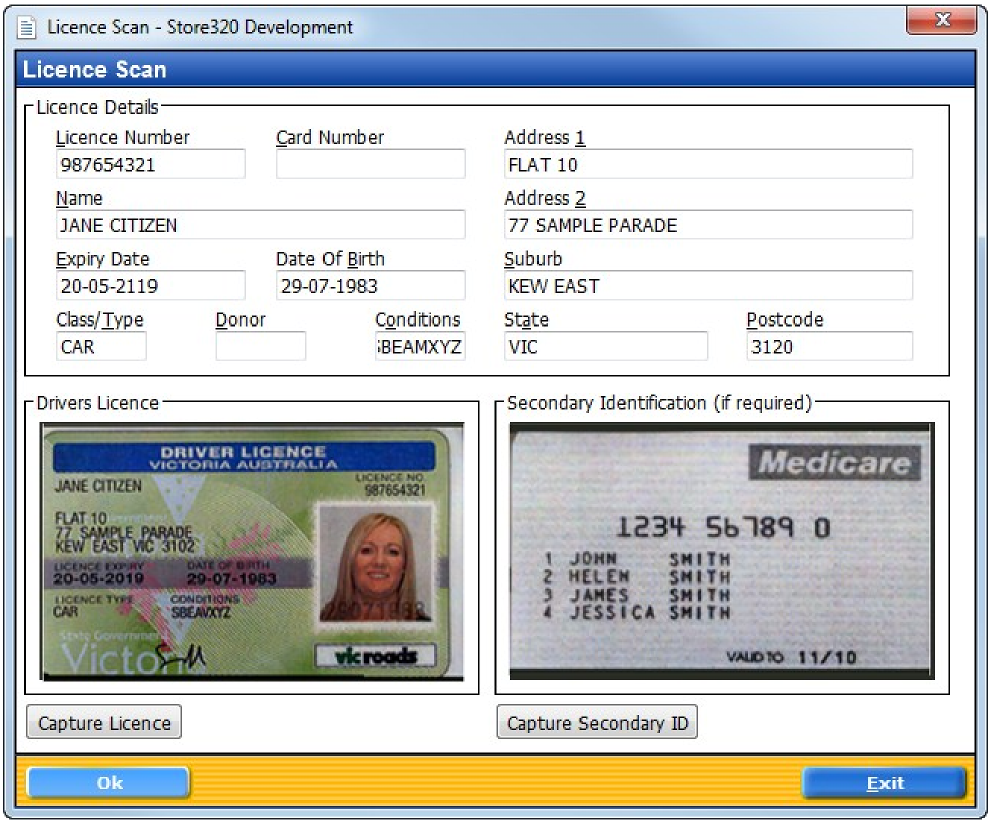
Select **OK** to acknowledge the message and connect the device to the computer.

If the license scanner software is not installed or has been installed with errors, the following pop up message will be displayed:



Select **OK** to acknowledge the message and refer to the ***ERAnet – Drivers Licence Scanner Installation*** for further instructions.

At the licence scanning popup, focus is automatically moved to the drivers **Capture Licence** button.
Place the licence on the scanner and click on **Capture Licence**, the following screen will be displayed:



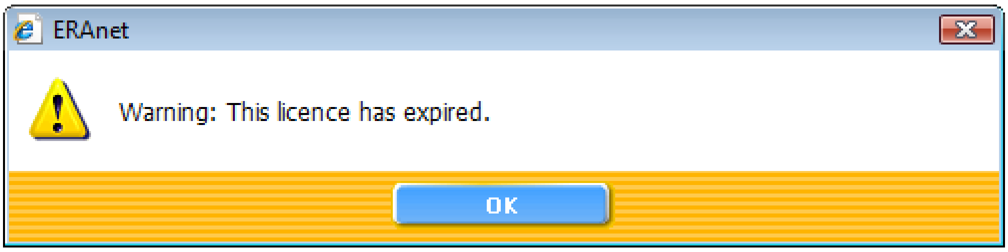
At the Showroom Reception screen the ***Prospect Number*** field will automatically display the new prospect number.

Note: Some of these fields may not be valid depending on the state the licence has been issued in.

Licence Data

Licence Number	This field displays the ***licence number***.
Card Number	This field displays the ***licence card number***. (NSW only).
Name	This field displays the ***name*** as presented on the licence.
Expiry Date	This field displays the ***licence expiry date***.
Date of Birth	This field displays the ***date of birth*** of the licence holder.
Class/Type	This field displays the ***licence type*** as presented on the licence. For example, **CAR** = Vehicle that does not exceed 4.5 tonnes Gross Vehicle Mass (GVM), **R** = Motor Cycle, Restricted Rider Licence.
Donor	This field displays the ***donor status*** as presented on the licence.
Conditions	This field displays the ***driving conditions*** as presented on the licence. For example, **A** – Automatic transmission, **S** = Glasses or corrective lenses.

Note: A warning message will appear if the licence has expired. This is a warning only to advise the user that the customer does not have a current drivers licence. Select the **Ok** button to acknowledge and return to the scan screen.



Address Data

Address 1	This field displays the ***address*** as presented on the licence.
Address 2	This field displays the ***address line 2*** as presented on the licence.
Suburb	This field displays the ***suburb*** as presented on the licence.
State	This field displays the ***state*** as presented on the licence.
Postcode	This field displays the ***postcode*** as presented on the licence.

Note: The option to modify the data is available by selecting the field and manually entering the required data.

Drivers Licence

Driver Licence	This field displays the ***picture and information*** as presented on the licence.
Capture Licence	Select this option to scan the licence or hit the ***Enter*** key.

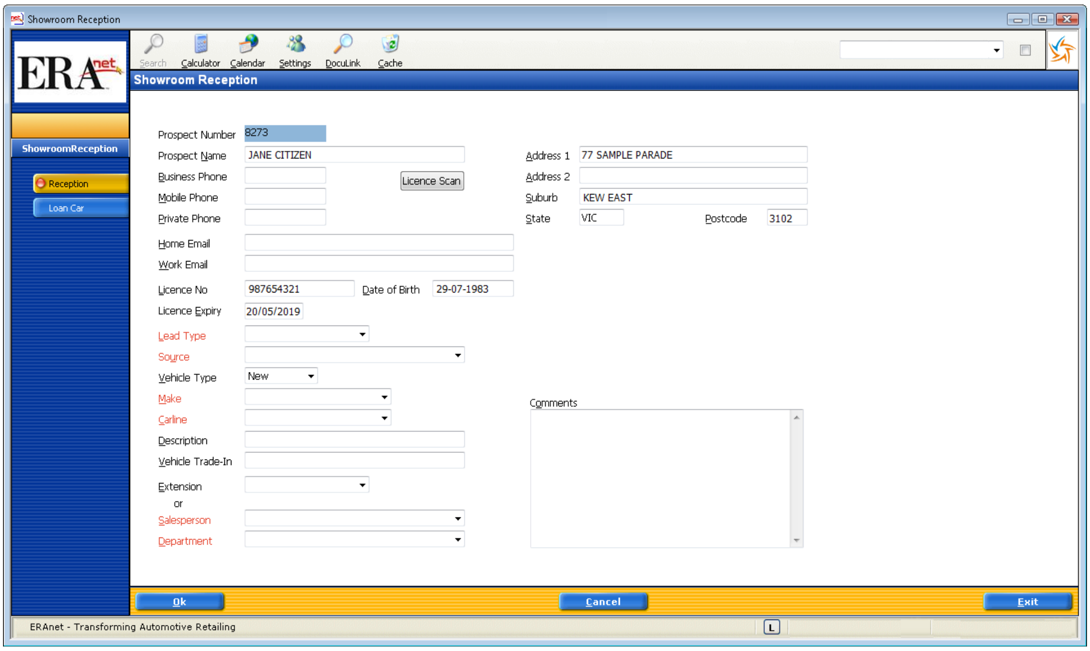
Secondary Identification (If required)

Secondary Identification	This field displays the ***picture and information*** as presented on the second form of id. **Note:** The secondary identification field will capture a second form of any ID card and save the information away for printing. For example Medicare card.
Capture Secondary ID	Select this option to scan the ***secondary identification (If required)*** or hit the ***Enter*** key. The secondary id field purely captures a second form of any id card and saves the information away for printing. (The use of this is optional).

Note: Select the **Capture Licence** and **Capture Secondary ID** options to rescan either id if required.

Ok	Select this option to automatically import the scanned data to the ***Showroom Reception*** screen.
Exit	Select this option to cancel the licence scan and return to the ***Showroom Reception*** screen. This option can be selected at any time.

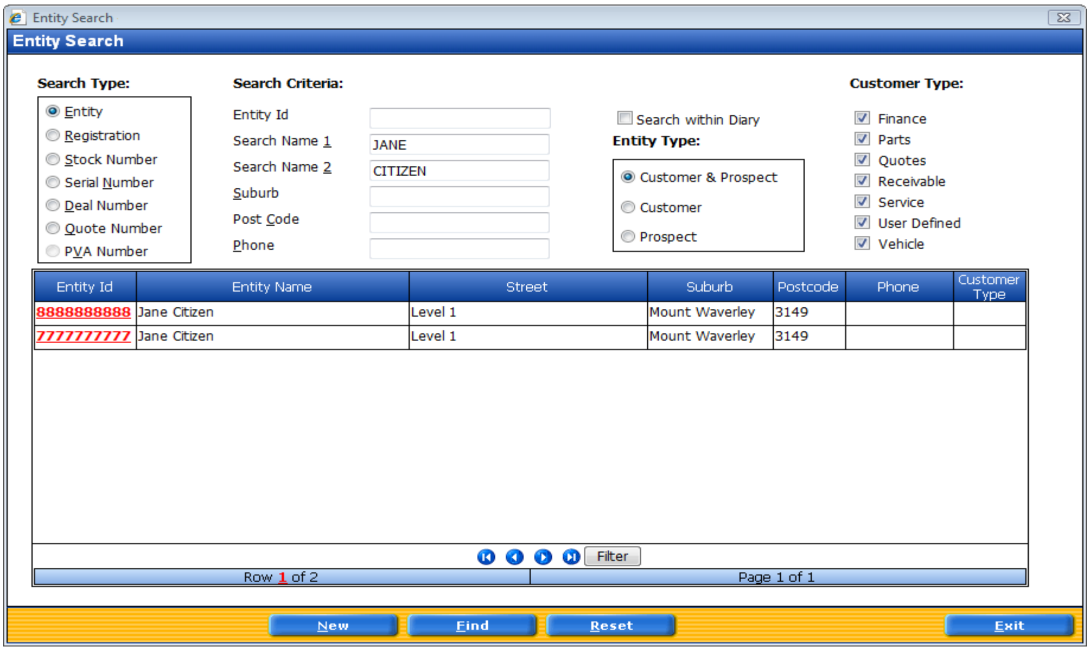
Select **Ok** from the action bar and the following screen will be displayed:



Proceed creating the new lead as per existing functionality.

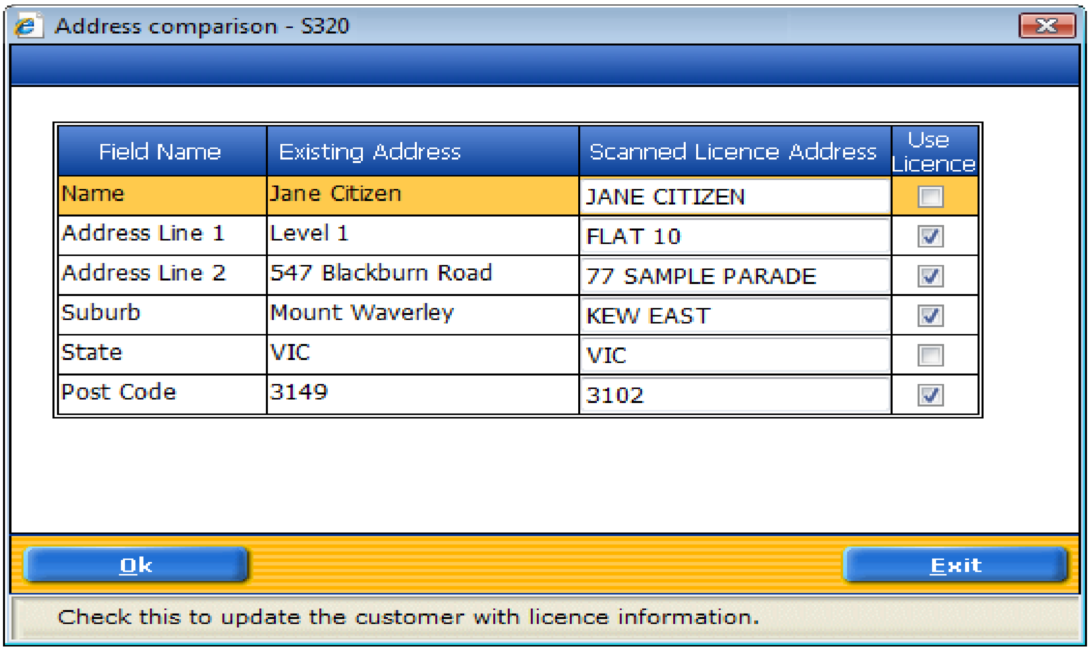
The user can ***modify*** the data by manually entering in ***Licence Data*** and ***Address Data*** box. The system will go to the ***Entity Search*** screen.

Once finished entering select the **Ok** button from the action bar and the following screen will be displayed:



Note: At the ***Search Name 1*** field it should pre–fill from the licence scan and returns the results. The user will then have the option to select an existing prospect/customer.

At the ***Entity Id*** field select the **Entity Id** Hyperlink you require and the following screen will be displayed:



Existing Address

Name	This field displays the ***name*** as existing on the database.
Address Line 1	This field displays the ***address*** as existing on the database.
Address Line 2	This field displays the ***address*** as existing on the database.

Suburb	This field displays the ***suburb*** as existing on the database.
State	This field displays the ***state*** as existing on the database.
Postcode	This field displays the ***postcode*** as existing on the database.

Scanned Licence Address

Name	This field displays the ***name*** as presented on the licence.
Address Line 1	This field displays the ***address*** as presented on the licence.
Address Line 2	This field displays the ***address*** as presented on the licence.
Suburb	This field displays the ***suburb*** as presented on the licence.
State	This field displays the ***state*** as presented on the licence.
Postcode	This field displays the ***postcode*** as presented on the licence.

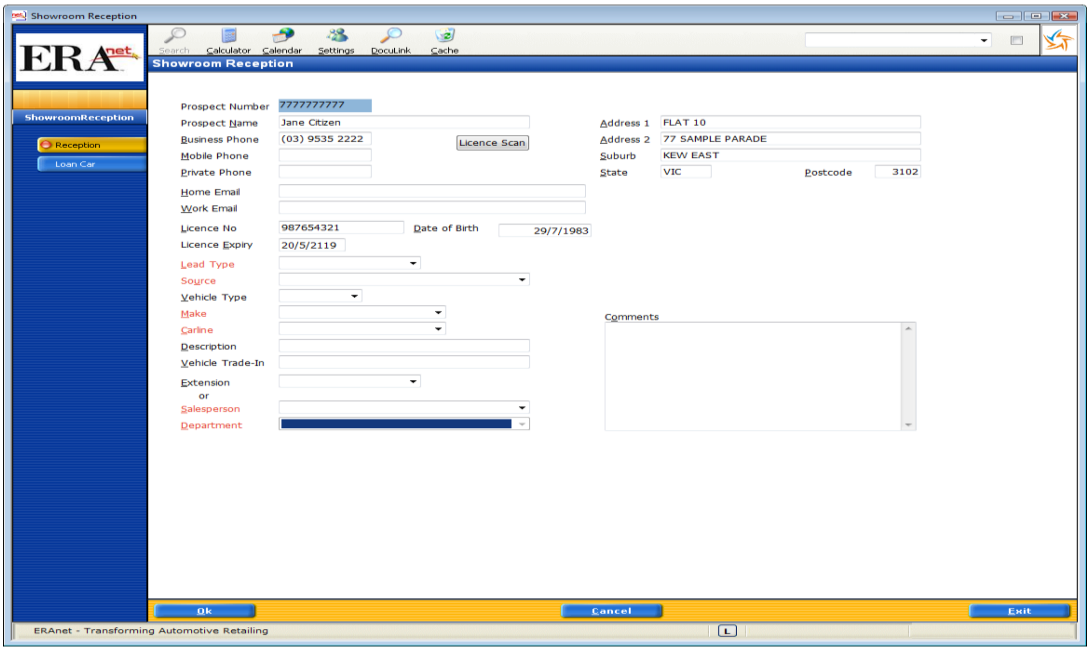
Note: At the **Scanned Licence Address fields** the option to ***modify*** the data is available by selecting the field and manually entering the required data.

Use Licence

Check Box	This field displays ***check box*** to use the ***new data*** instead of existing data.
Un–Check Box	This field displays ***un–check box*** to use the ***existing data*** instead of new data.

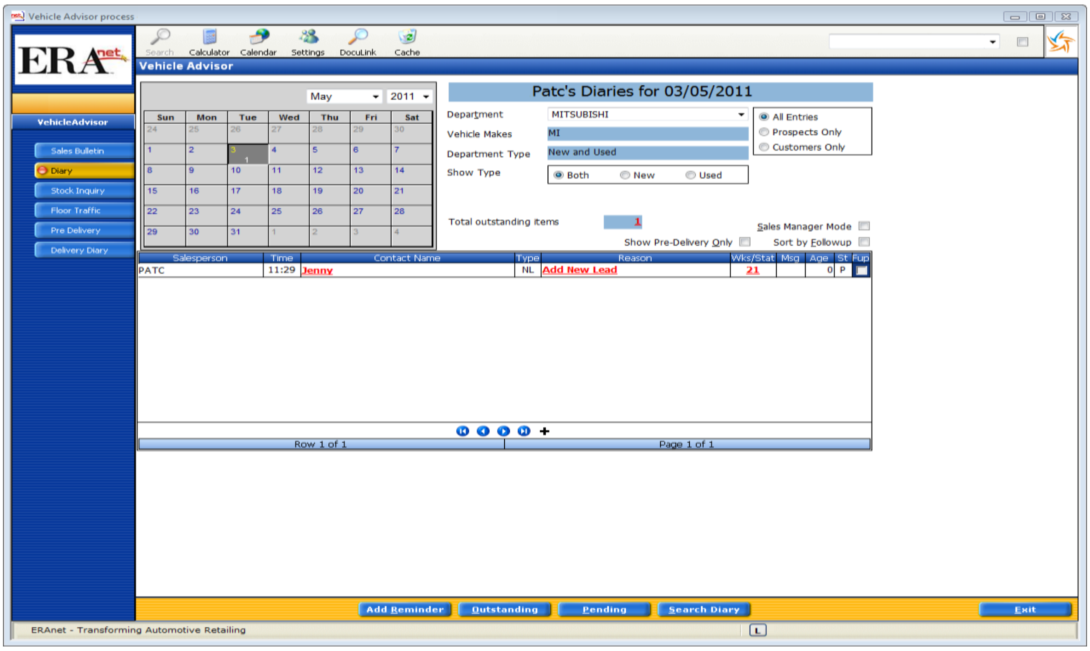
Note: Use Licence field will automatically ***check box*** when the user changes the new address from the beginning but the user can still un-check manually.

Select Ok from the pop up message and the following screen will be displayed:

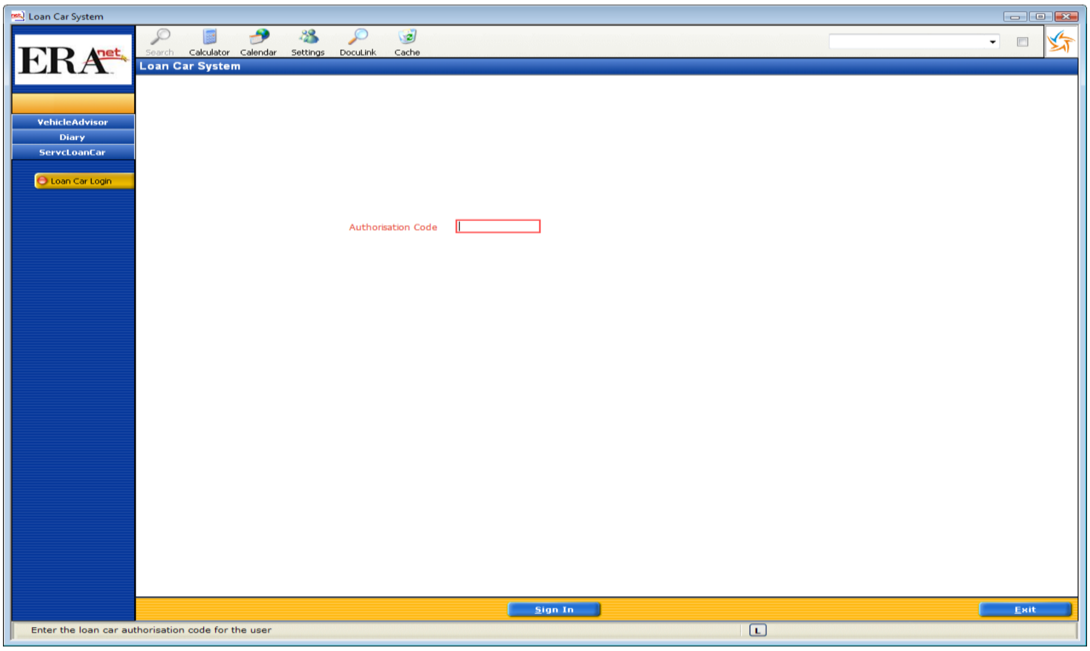


The ***Showroom Reception screen*** will automatically display the new data. Proceed to create the new lead as per existing functionality.

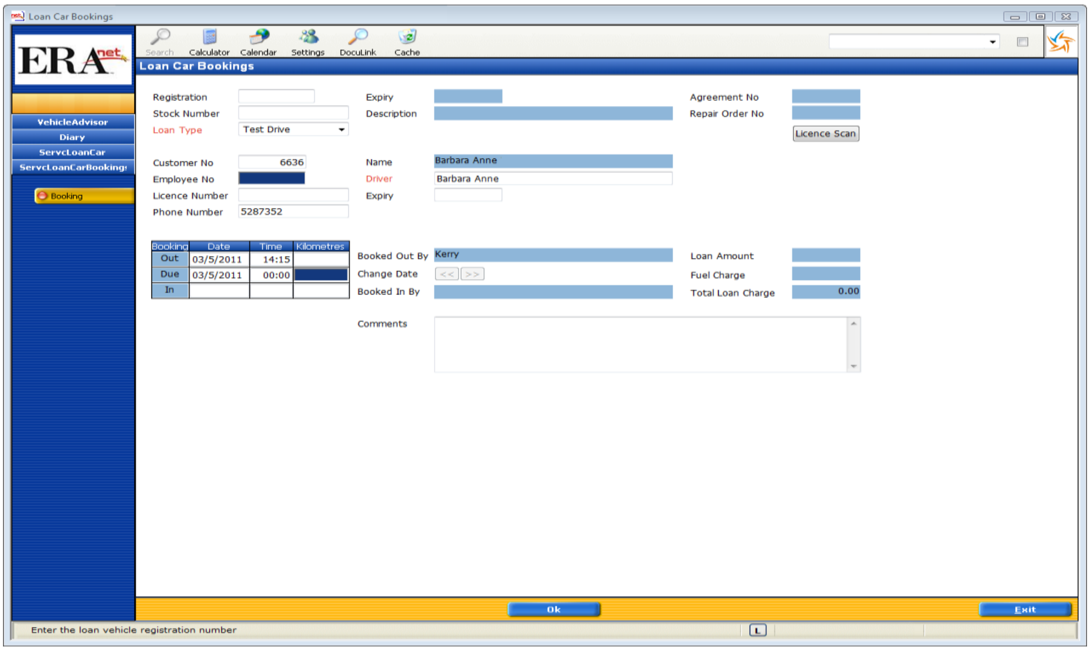
From the main menu, select ***Showroom***, then ***Vehicle Advisor*** as per existing functionality and the following screen will be displayed:



Click the **Reason** Hyperlink to go to the Diary screen then click on **Loan Car** from the Navigation bar and the following screen will be displayed:



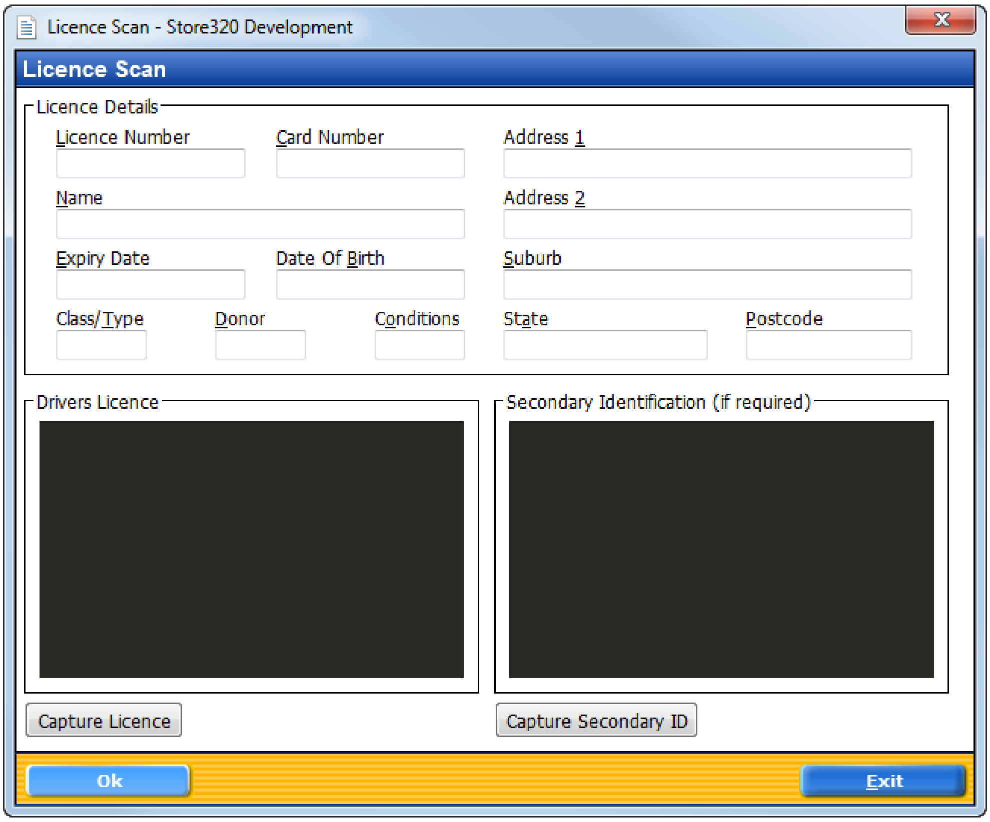
Enter the ***loan car authorisation code*** for the user in Authorisation Code field and then select the **Sign In** button at the action bar and the following screen will be displayed:



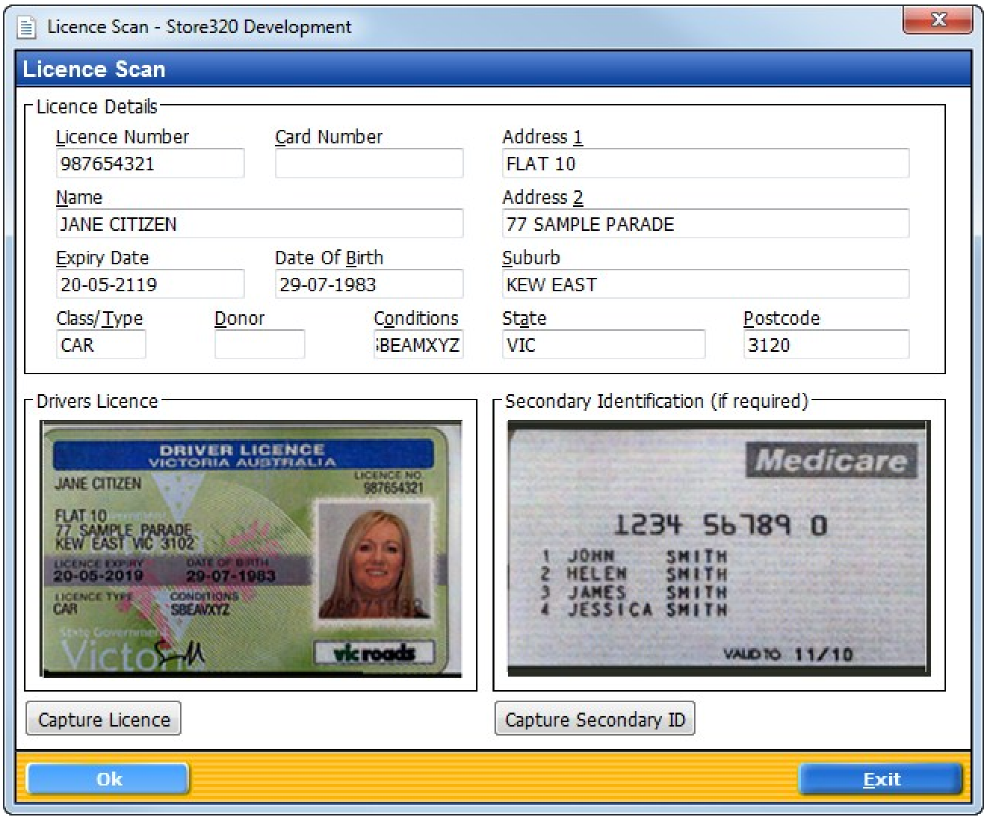
Note: This **Licence Scan** button will only exist if the customer/prospect is not a ***RECEIVEABLE*** customer.

A receivable customer is defined in ***0556 – Entity Master, ERAnet Prospect*** and ***Entity Maintenance screen*** at the Customer Type field.

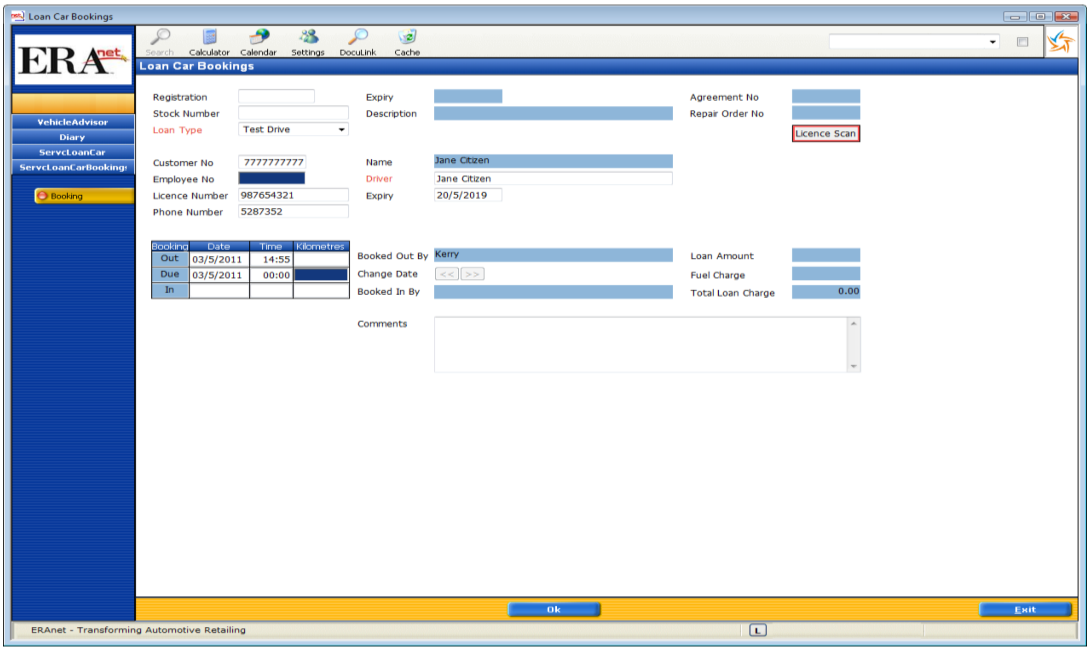
Select the **Licence Scan** button and the following pop up screen will be displayed:



Place the licence on the scanner, click the Capture Licence option and the following screen will be displayed:

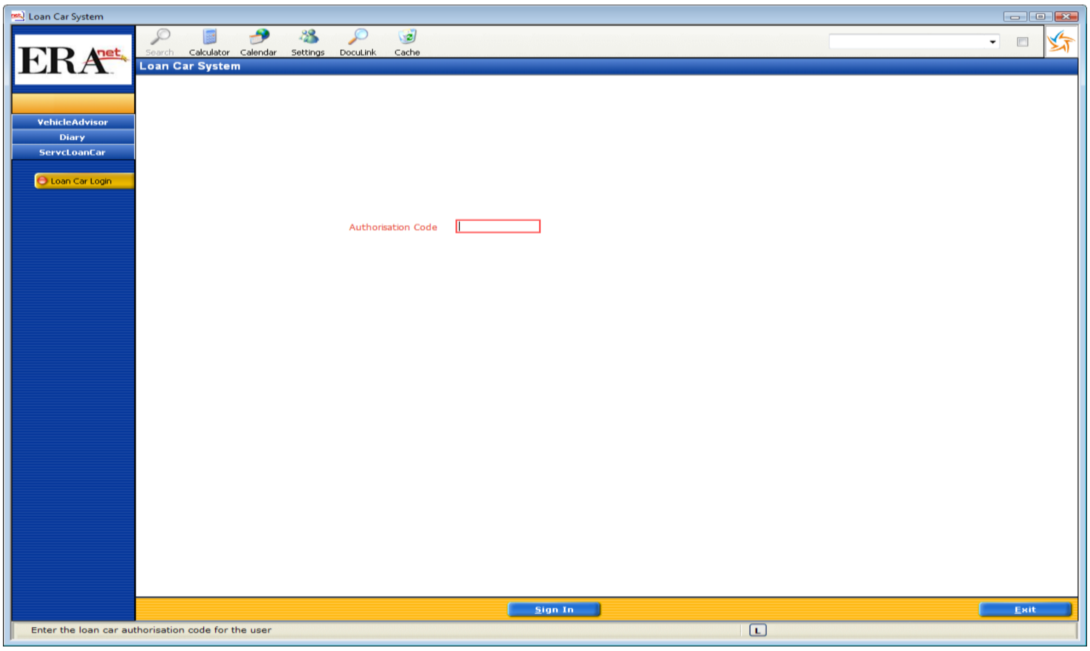


The functionality is the same as Showroom Reception. Select **Ok** from the action bar and the following screen will be displayed:

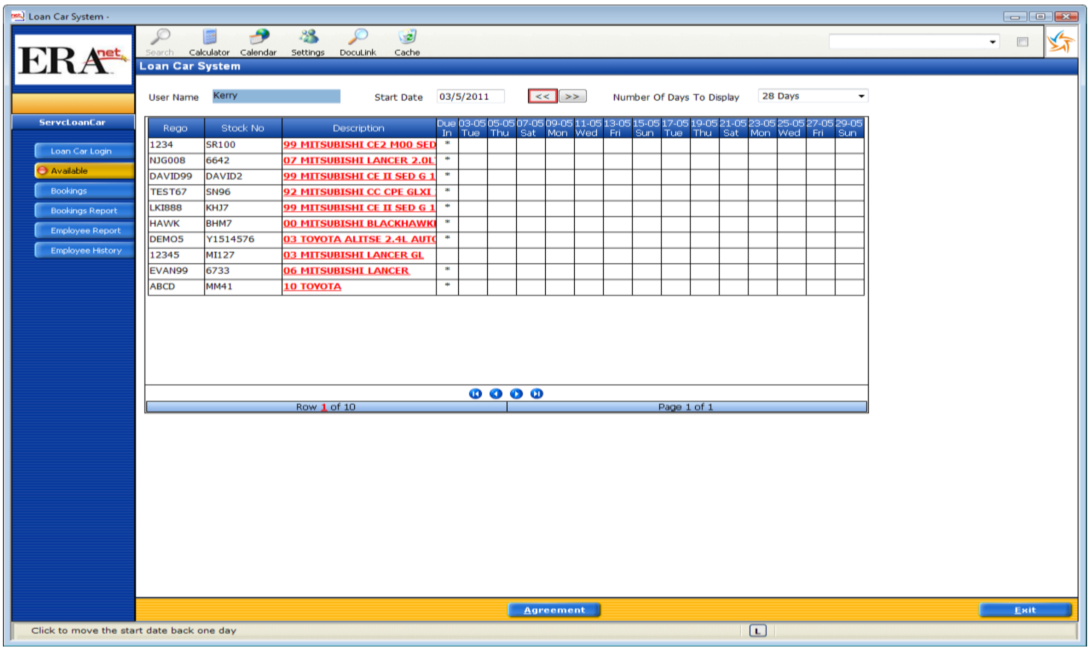


Proceed creating the new Loan Car Booking as per existing functionality.

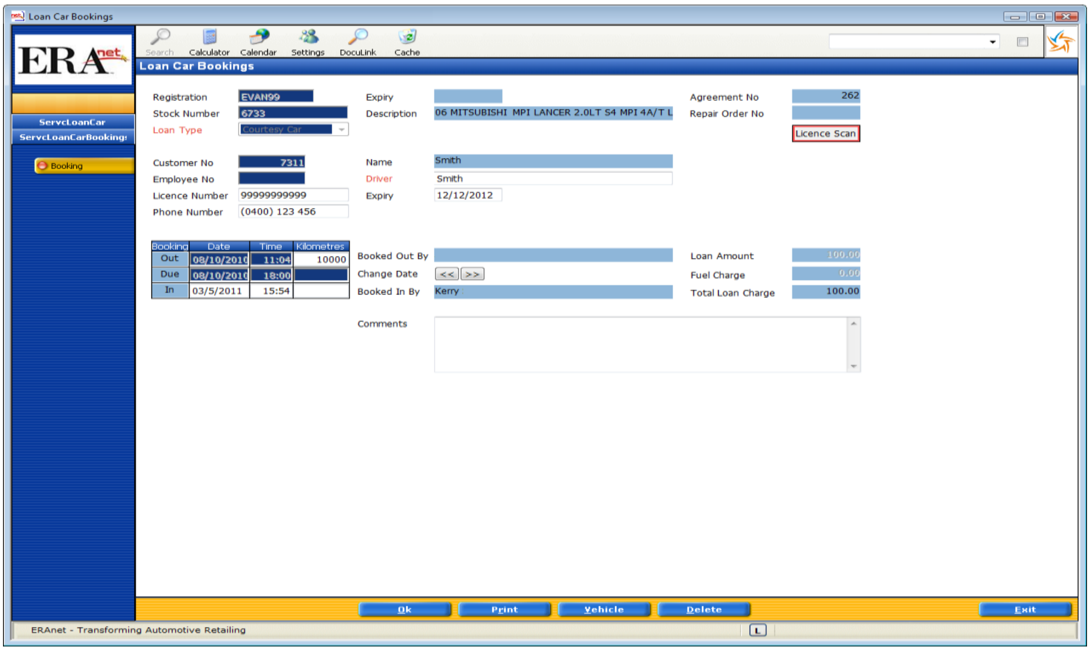
From the main menu, select ***Service***, then ***Loan Car System*** and the following screen will be displayed:



Enter the ***loan car authorisation code*** for the user in Authorisation Code field and then select the **Sign In** button at the action bar and the following screen will be displayed:



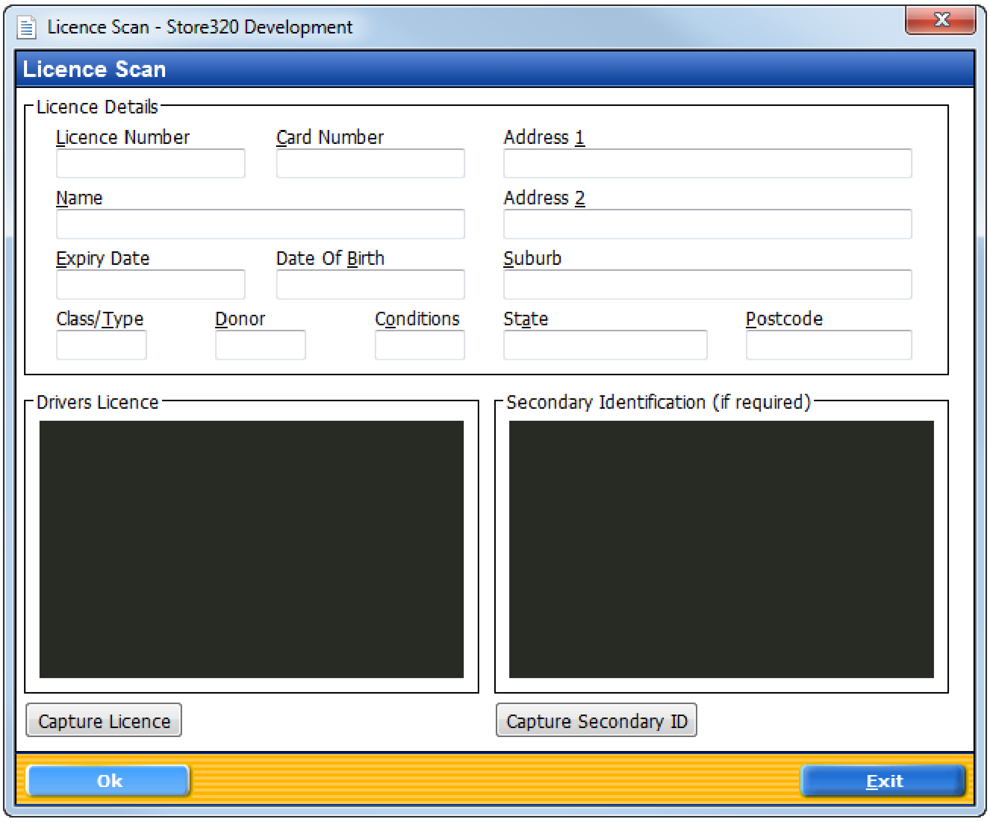
Select the **Vehicle Description** Hyperlink that the user requires and the following screen will be displayed:



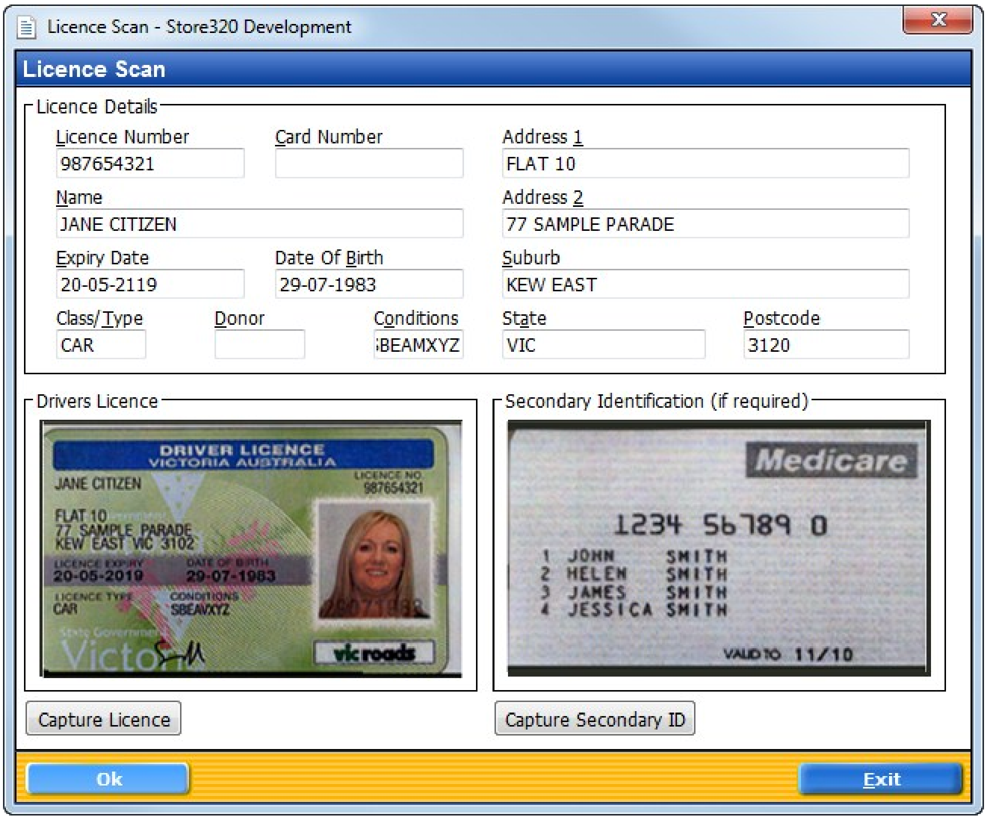
Note: This Licence Scan button will only exist if the vehicle doesn't belong to a ***RECEIVEABLES*** customer.

A receivables customer is defined in ***0556 – Entity Master, ERAnet Prospect*** and ***Entity Maintenance screen*** in at Customer Type field.

Select the Licence Scan button and the following pop up screen will be displayed:



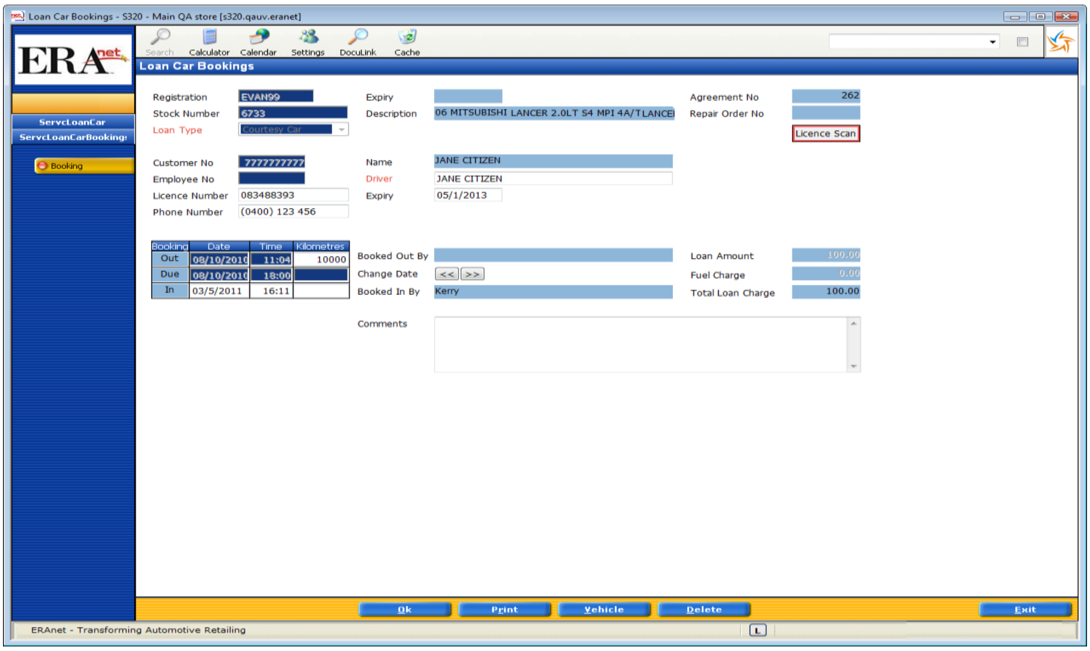
Place the licence on the scanner and click on the **Capture Licence** button to scan the licence. Click on **Capture Secondary ID** and the following screen will be displayed:



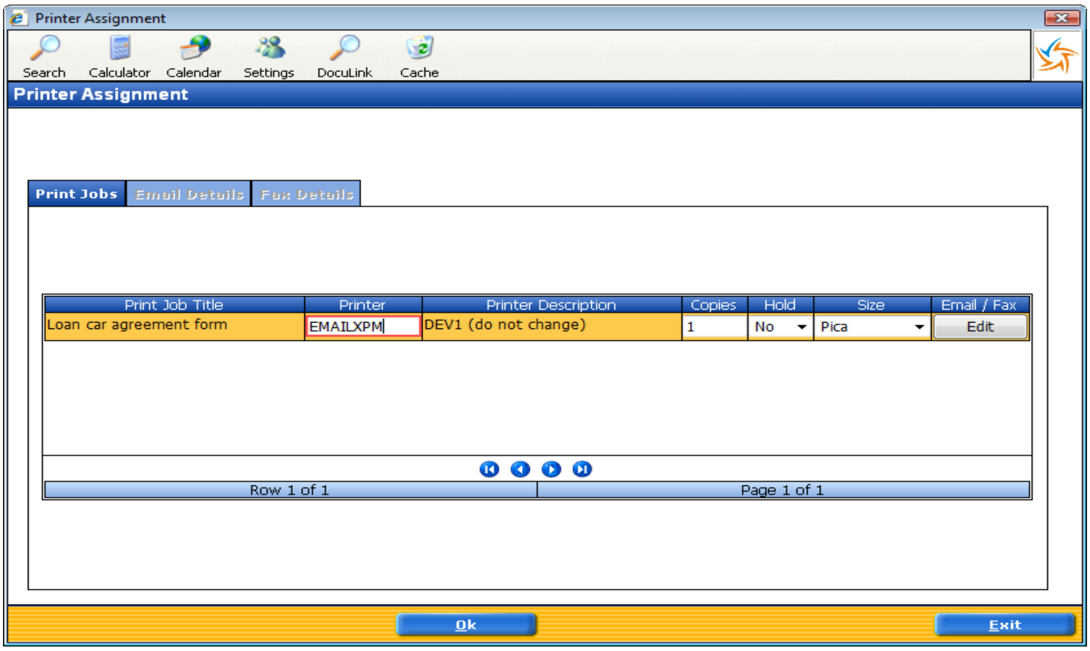
The functionality is same in Showroom Reception and Loan Car in Vehicle Advisor as mentioned.

Note: Once all required information has been entered make sure that the licence number and expiry date is entered and correct.

Select **Ok** from the action bar and the following screen will be displayed:



Select **Print** from the action bar and the following screen will be displayed:



Select **Ok** from the action bar and the ***VEHICLE LOAN AGREEMENT*** will print as shown in the following example:

VEHICLE LOAN AGREEMENT Repair Order: Loan No: 277

Vehicle Details

Vehicle	06 MITSUBISHI LANCER		
Colour			
Reg No.		Kms Out	

Loan Details

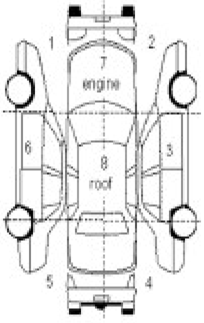
Date Out	18 JUL 2011	Date Due	19 JUL 2011
Time Out	11:35am	Time Due	03:00am
Fuel Rate	REYNOLDS MOTORS	Loan Rate	

Customer Details

Name	Jane Citizen	Address	Level 1
Phone No.	03-95352222		547 Blackburn Road

Driver Details

Name	Jane Citizen	Licence No.	987654321
Phone No.		Licence Exp.	20 MAY 2019



The Dealer makes available to the customer a vehicle for loan purposes only on the terms and conditions described below.

Note that vehicle travel is restricted to 100 kilometres per calendar day unless otherwise agreed in writing

We are happy to provide our customers with a loan vehicle and certify that the vehicle is roadworthy and registration is current. However, our insurance providers have placed the specific conditions above regarding the collection of driver identification before a vehicle can be used by our customers.

This agreement is not intended to be a car rental agreement or transfer title to you. Our insurance cover for the vehicle is for its market value and damage to third party property is covered to $30,000,000. This cover and any subsequent claim are subject to the terms and conditions of this policy including the payment of an excess in the event of lodging an insurance claim.

Basic excess $1500

Plus an additional age excess for drivers 24 years or younger $750

However, this or any other insurance policy may not cover all the damage to or caused by this vehicle and in this regard you are responsible to reimburse immediately the cost of these damages to the dealership, including any insurance policy excess if and when damage may occur.
Our expectation is that you will do all things necessary to keep and maintain the vehicle in its current state and condition.

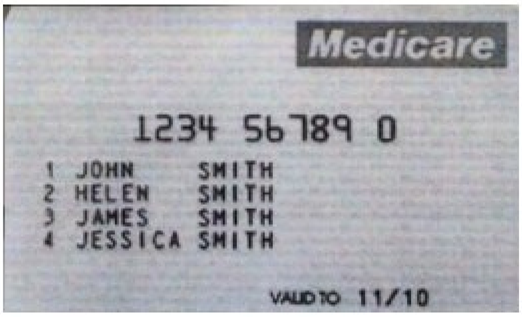
This document and the conditions set out overleaf detail the terms on which the dealership will loan you this vehicle.

All fees associated with the loan of this vehicle are shown in your service repair invoice and are charged purely to maintain and supply our customers a loan vehicle. You consent to the collection and use of your personal information in line with this companys Privacy Statement.

Drivers Signature________________________ Date____________

Existing damage noted at dealership: ____________ **Date:** ____________
Additional damage noted:

- ☐ 1. Passenger Front
- ☐ 2. Driver Front
- ☐ 3. Driver Side
- ☐ 4. Driver Rear & Boot/Tailgate
- ☐ 5. Passenger Rear & Boot/Tailgate
- ☐ 6. Passenger Side
- ☐ 7. Front End/Bonnet
- ☐ 8. Roof
- ☐ 9. Fuel tank Full
- ☐ 10. Other
- ☐ Tyres
- ☐ Windscreen/Glass
- ☐ Roof
- ☐ Interior/accessories
- ☐ Engine & Under body



Office Use Only

Vehicle returned in a satisfactory condition. Yes ☐ No ☐
Remarks

Fuel: Out E | | | F In E | | | F

Checked in by:
(Print Name)

Date In: Time In: AM/PM

Benefits

Data is now automatically scanned into the system, saving users time and providing greater data integrity.

Activation Key

ERA–LIC–SCAN

ERAnet – New South Wales Policebook Forms – PPS Register

Statutory

Overview

New South Wales Policebook forms have been updated in ERAnet to cater for the latest statutory changes. There are two changes that have taken place.

The following changes have taken part in Part 2 of Forms 3, 4, 5, 6 and 8:

Change 1:

> *The information below has been checked with the Register of Encumbered Vehicles (REVS).*
> *Note.*
> *REVS records do not include written off vehicles that were repaired and re-registered prior to 1 July 2003.*
> *For more information about what is recorded on the register, contact REVS*.

The above statement has been replaced with the following:

> *The information below has been checked with the Personal Property Securities Register (the PPS Register) established under the Personal Property Securities Act 2009 of the Commonwealth.*

Change 2:

> *THE VEHICLE IS/IS NOT LISTED ON REVS AS BEING, OR HAVING BEEN, A WRITTEN OFF OR WRECKED MOTOR VEHICLE.*

The above statement has been replaced with the following:

> *THE VEHICLE IS/IS NOT LISTED ON THE PPS REGISTER AS BEING, OR HAVING BEEN, A WRITTEN OFF OR WRECKED MOTOR VEHICLE.*

Why

This change was made due to a statutory requirement and is effective immediately.

Screens

Used Vehicle Maintenance

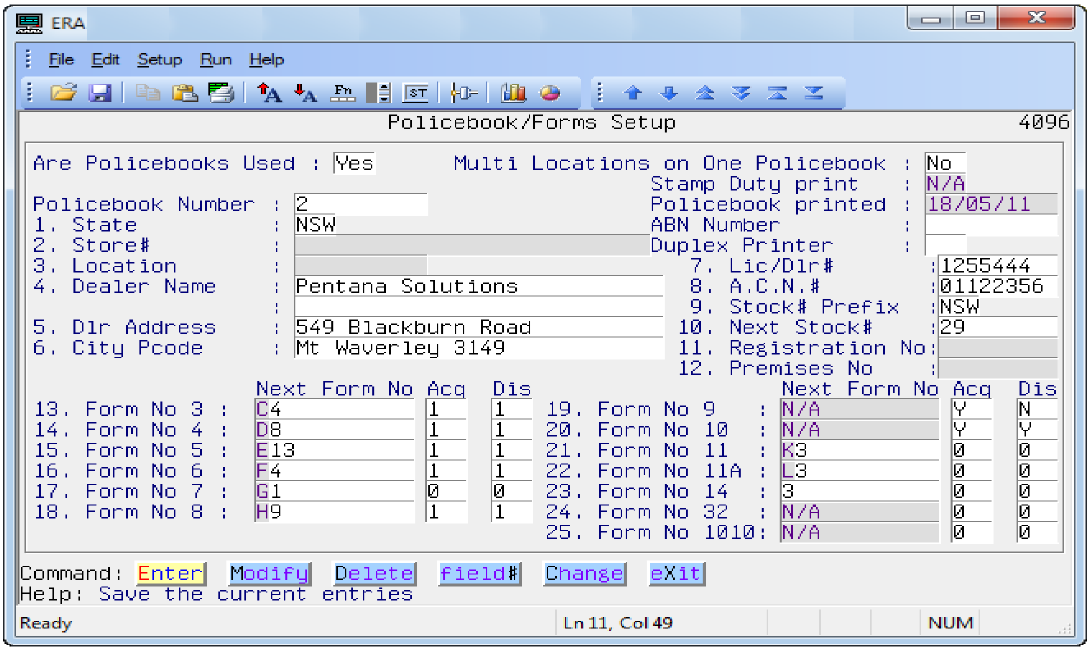
Policebook Form Print

4008 - Used Vehicle Maintenance
4094 - Form Printing
4096 - Policebook/Forms Setup

The Setup

The following setup will need to be checked and updated prior to printing out a Policebook form.

Select ***4096 – Policebook/Forms Setup*** and the following screen will be displayed:



Select ***Enter*** from the command line to save the changes.

The Change

The following changes are relevant to Forms 3, 4, 5, 6 and 8 in Part 2.
Note: The functionality has not changed. The user is able to print the Forms as per existing functionality in ERA2 and ERAnet. Following is an example of the current change:

H1
Register Details
Book No. 2
Entry No. NSW25

Form 8

Sale Notice - No Warranty

No warranty under the Motor Dealers Act 1974 applies to this vehicle

Motor Dealers ACT 1974: *section 24/section 28

Part 1 (To be completed when vehicle offered or displayed for sale)

Dealer	Pentana Solutions A.C.N. 011 223 56	Licence No	1255444
Full Business Address Of Dealer Where Vehicle Sold	549 Blackburn Road (No) (Street) Mt Waverley 3149 (Suburb/Town/City)		
Make Of Vehicle	MITSUBISHI	Engine No	123-1
Model Designation	LANCER CJ MY09	VIN Or Chassis No	JGSER14LNUMBR0001
Date Of Manufacture	01/01/08	Distance Travelled	020000 km
Body Type	HATCHBACK	Registration No	JG001
Cash Price $		Date Of Expiry Of Registration Date Of Notice	31/03/2012 02/02/2012

Part 2 (To be completed when vehicle offered or displayed for sale)

NOTE: This part is to be deleted if the form is attached to a vehicle pursuant to section 28 of the Act (for the purpose of exempting a dealer from the statutory obligation to repair defects appearing or occurring in the vehicle).

The information below has been checked with the Personal Property Securities Register (the PPS Register) established under the *Personal Property Securities Register 2009* of the Commonwealth.

THE VEHICLE IS/IS NOT LISTED ON THE PPS REGISTER AS BEING, OR HAVING BEEN, A WRITTEN OFF OR WRECKED MOTOR VEHICLE.

(delete inapplicable words)

Part 3 (To be completed at or before time of sale)

Cash Price At Which Vehicle Sold $		Odometer Reading At Time Of Sale	km
Serial No. Of Inspection Report (RTA) (where applicable)		Date Of Issue Of Report	
Purchaser's Full Name			
Purchaser's Address			
Trade-In (if any) (Description)	(Registration No)	Trade-In Allowance $	
Purchaser's Signature		Date Of Sale	
Name (print) And Signature Of Person Effecting Sale			

Unless this vehicle is unregistered and the registration plates removed or is substantially demolished, the dealer must deliver to the purchaser an inspection report issued in accordance with the regulations under the *Road Transport (Vehicle Registration) Act 1997*, which has been issued not more than 90 days before the date of sale stating that the vehicle is roadworthy unless registration of the vehicle has been effected within one month before that date.

Part 4

THERE IS NO WARRANTY UNDER THE MOTOR DEALERS ACT 1974 IN RESPECT OF THE SALE OF THIS VEHICLE. ACCORDINGLY THE DEALER IS NOT REQUIRED BY THE ACT TO REPAIR OR MAKE GOOD ANY DEFECT WHICH MAY EXIST OR OCCUR IN THIS VEHICLE.

Note: Reference to REVS has now been replaced with PPS Register. These changes have also taken place in Part 2 of Forms 3, 4, 5 and 6.

Benefits

Policebook forms are in line with the new statutory changes for New South Wales.

ERAnet – NSW Policebook Disposal screen in Trade – In Enhancement

Overview

An enhancement has been made to new validation to disable Trade – In Detail section fields in NSW Policebook Disposal screen for (Truck) Vehicle type.

Why

This enhancement was made at the request of the Customer Development Committee (CDC) to enhance existing functionality.

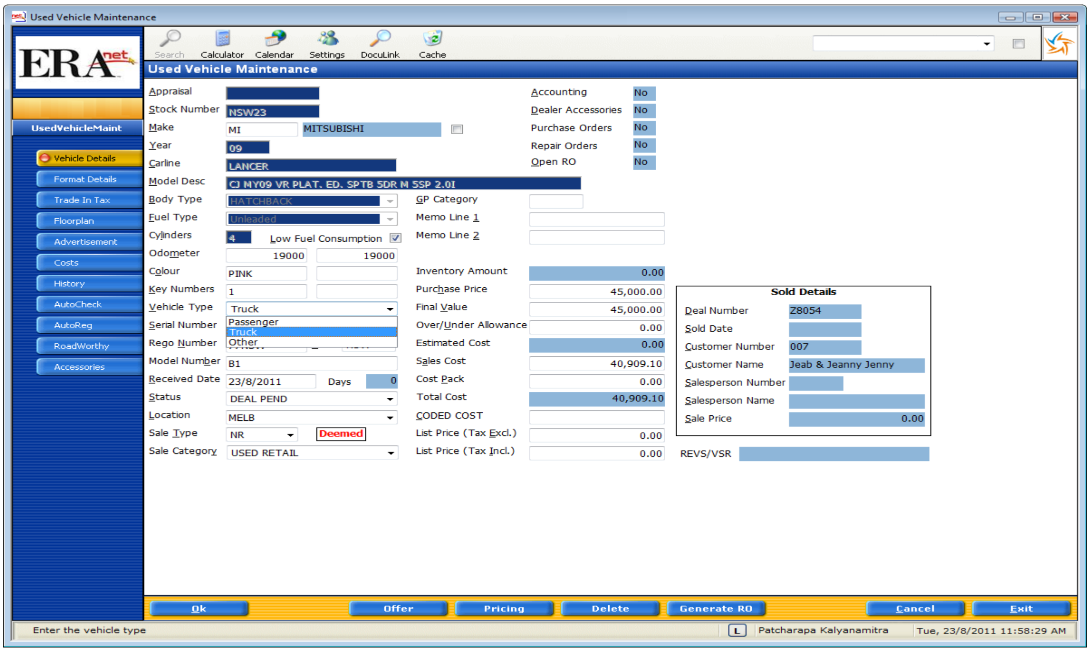
Screens

Used Vehicle Maintenance
Vehicle Sale Process
4008 – Used Vehicle Maintenance
4096 – Policebook/Forms Setup

The Change

ERAnet

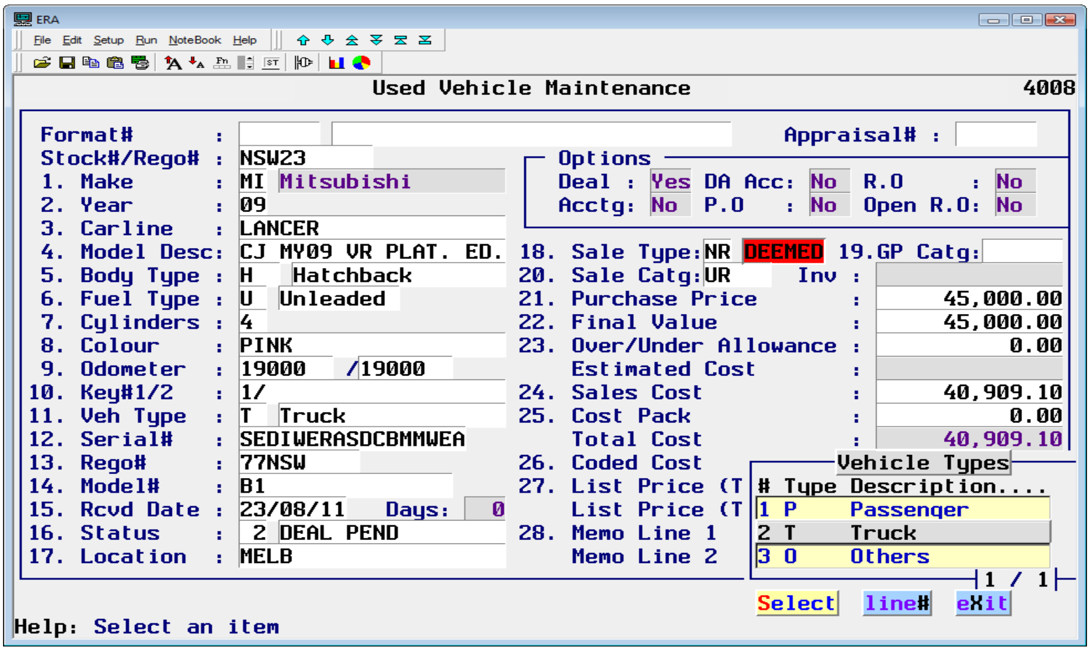
In the ***Showroom*** menu, select ***Vehicle Inventory*** followed by ***Used Vehicle Maintenance***.
Then create a used vehicle at previous functionality the following screen will be displayed:



At the ***Vehicle Type fields*** select ***Truck*** from the drop down box and enter all required information as previous functionality. Make a note of stock number then select Ok from the action bar to save the record.

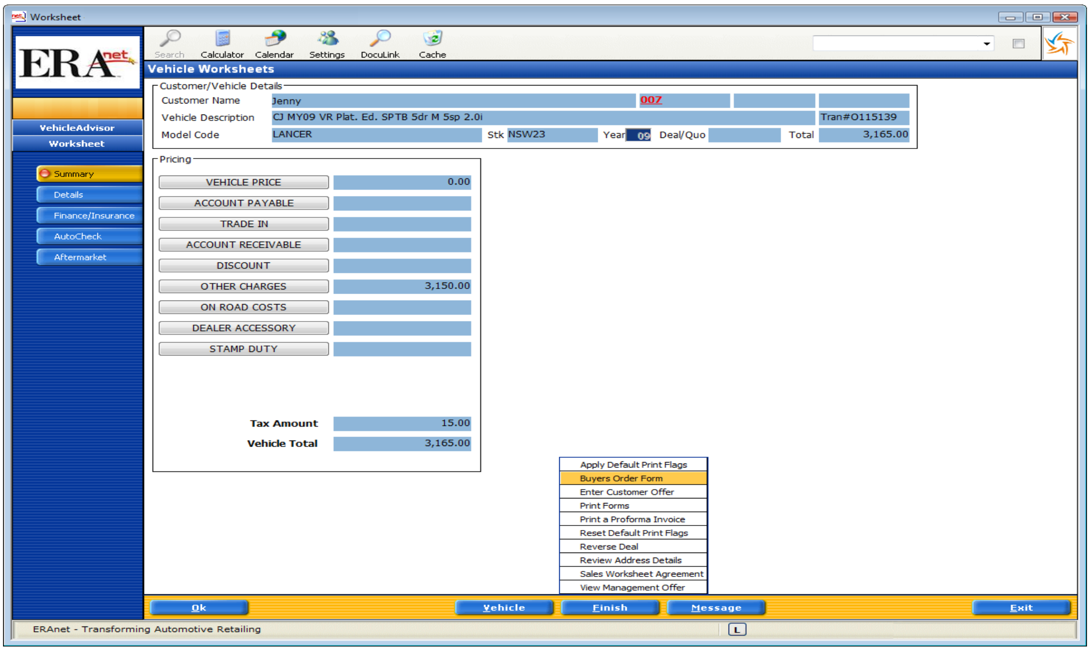
ERA

Enter ***4008 – Used Vehicle Maintenance***, then create used vehicle as previous functionality and the following screen will be displayed:



At fields number ***11 Veh Type*** enter **T** for **Truck** or select from the look up and enter all required information as previous functionality. Make a note of stock number then select ***Enter*** at the command line the save the record.

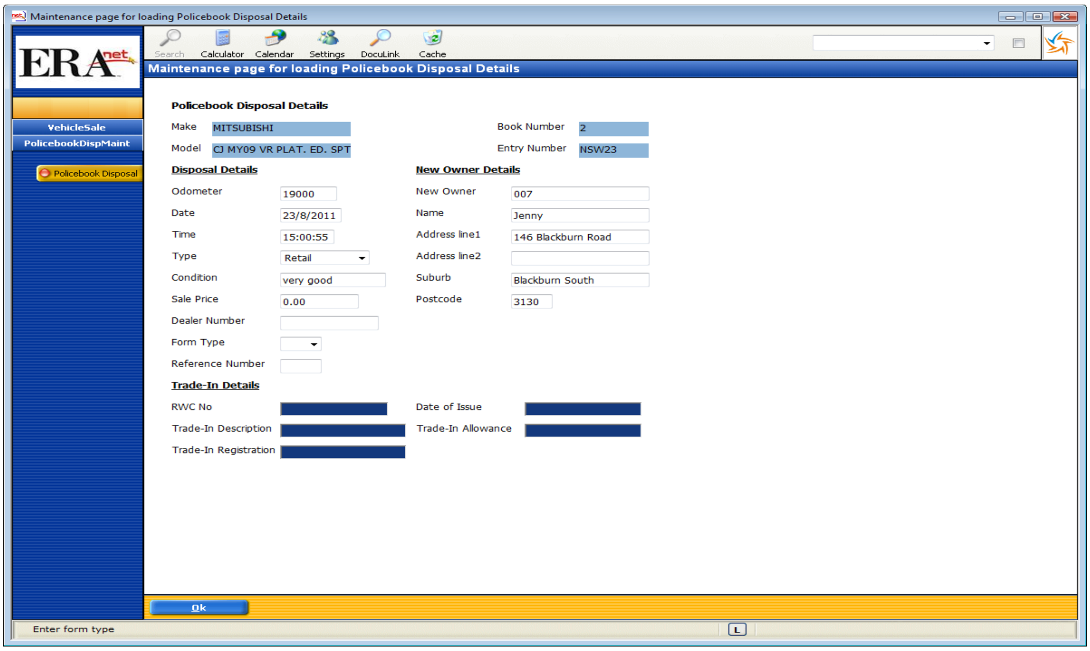
As per existing functionality, enter the ***Showroom*** menu followed by ***Vehicle Advisor*** to create a worksheet using the stock number created in ***Used Vehicle Maintenance*** or ***4008 – Used Vehicle Maintenance*** or and the following screen will be displayed:



Select Finish from the action bar, followed by ***Buyers Order Form*** to print an RBO.

Once the form is selected, **Print** at the action bar to print the ***RBO*** and screen back to Vehicle Advisor worksheet lists and make a note of your deal number as per the existing process.

As per previous functionality, bring a deal through ***Vehicle Sale Process.*** Select all required information until go to ***Maintenance page for loading Policebook Disposal Details*** or ***Policebook Disposal Detail*** and the following screen will be displayed:



Trade – In Details

RWC No	When the Vehicle type is ***Truck, RWC No*** field will be disabled.
Date of Issue	When the Vehicle type is ***Truck, Date of Issue*** field will be disabled.
Trade-In Description	When the Vehicle type is ***Truck, Trade – In Description*** field will be disabled.
Trade- In Allowance	When the Vehicle type is ***Truck, Trade – In Allowance*** field will be disabled.

Benefits

The new validation to disable Trade – In Detail section fields in NSW Policebook Disposal screen for (Truck) Vehicle type.

ERAnet – Pre-Delivery System

Optional Software

Overview

The Pre-Delivery System has been enhanced to track the flow of vehicles from the point of ordering by the customer through to the delivery of the vehicle to the customer. Users are also able to generate a report for Fleet Customers to notify them on the status of their vehicle orders and an onscreen report has been created to display the deliveries that have been scheduled for the week.

Why

This change was made through a Request For Development submission to enhance existing functionality.

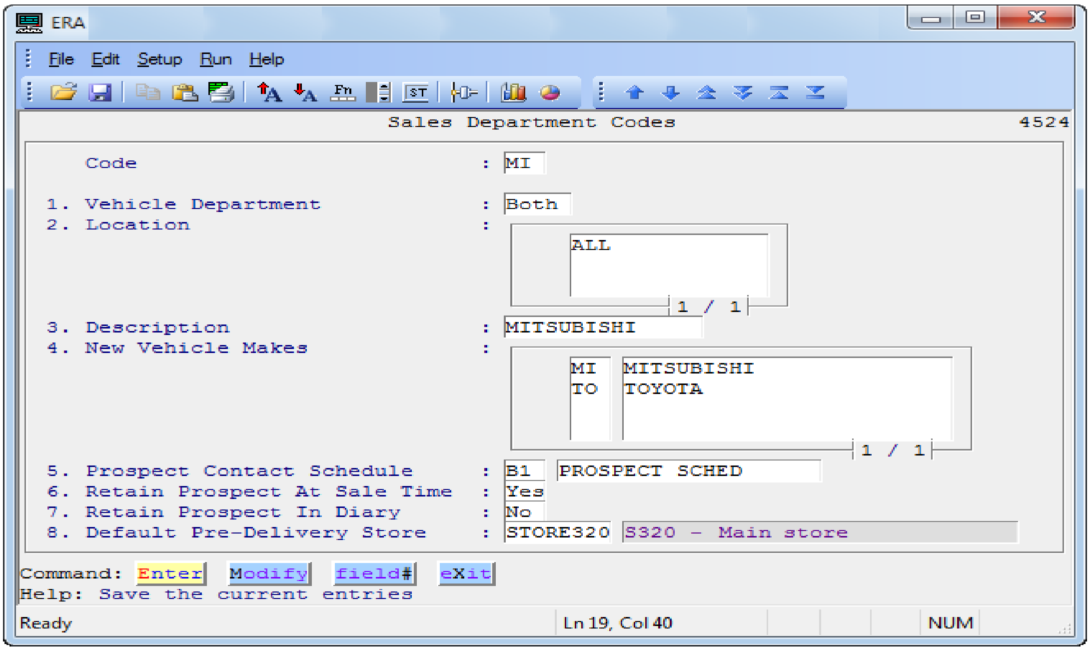
Screens

Deal Log Report – Sales Manager
Deal Log Report – Stock Control
Delivery Diary
Pre-Delivery
Pre-Delivery Setup
Prospect Maintenance
RO Close Out
Salesperson Maintenance
Service
Showroom
Showroom Analysis
Showroom Setup
Vehicle Advisor
Workshop Control Menu
3045 – User Definable Fields
3685 – Service Specification Maintenance
4084 – Vehicle Entry Formats
4090 – User Define Relate Table
4184 – User Defined Fields Maint
4524 – Sales Department Codes
6973 – Purchase Order Creation/Maint

The Setup

The following ERA2 setup is required to be checked and updated prior to using the Pre-Delivery system.

The user is able to allocate a service store to a Sales Department where the Pre-delivery repair orders will be created in. Select ***4524 – Sales Department Codes*** and enter a ***Sales Department Code*** and the following screen will be displayed:



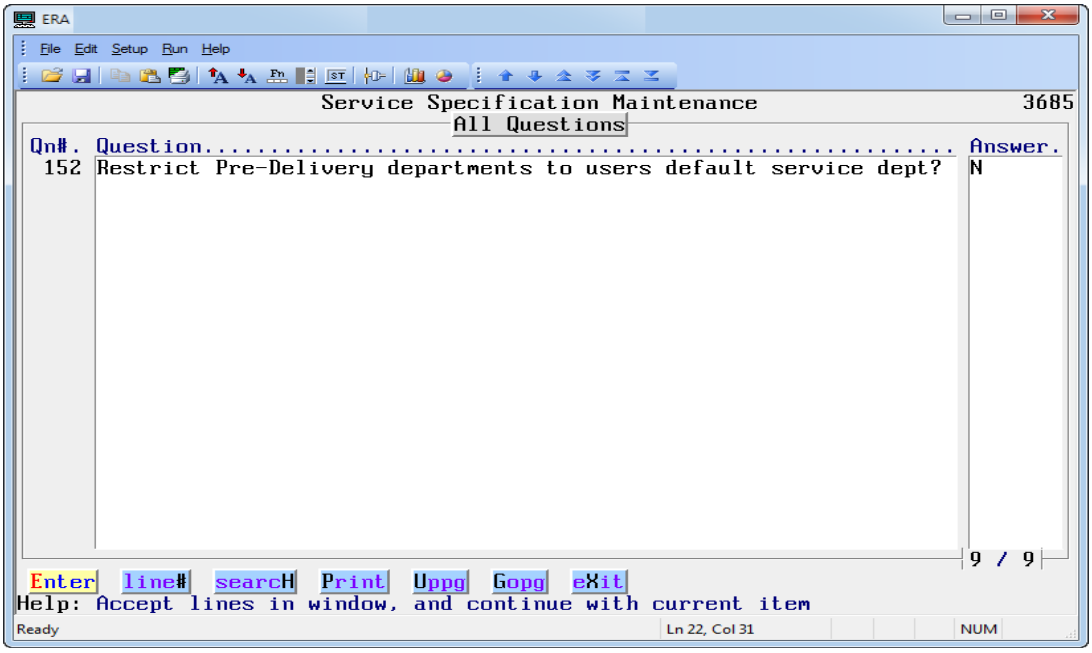
A new field *Default Pre-Delivery Store* has been added.

Select line ***8 - Default Pre-Delivery Store*** followed by the ***/*** lookup to select a valid ***Service Store*** where the Pre-Delivery Repair Orders will be created for this Sales Department.

Note: If nothing is entered on this line, the Pre-Delivery repair order will be created based upon the *4186 – Auto RO Generation Setup*.

Select ***Enter*** from the command line to save the changes.

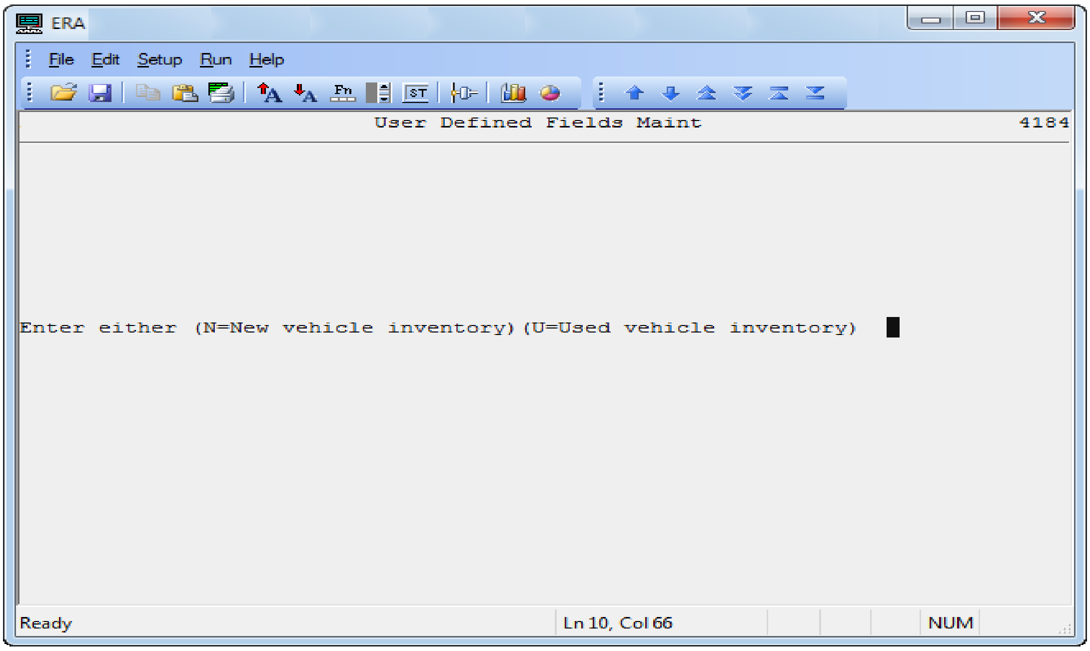
The dealership is able to restrict the user to view specific department that the service user belongs to. Select ***3685 – Service Specification Maintenance*** followed by ***1 – All Questions*** then scroll through the pages to get to ***question 152*** and the following screen will be displayed:



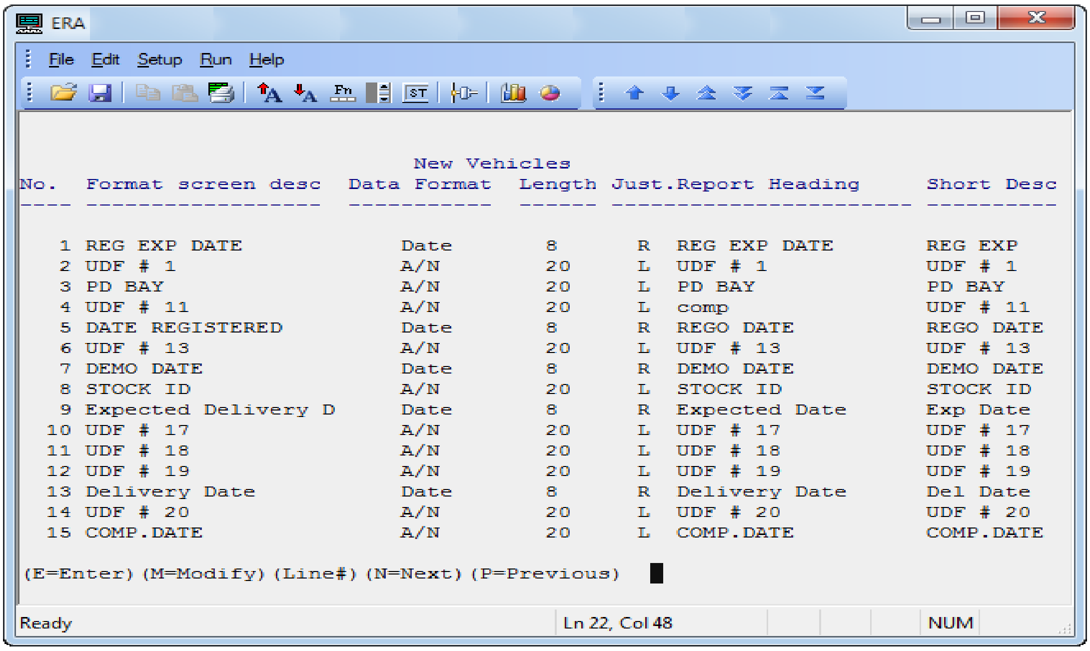
152 – Restrict Pre-Delivery departments to users default service dept?	Enter ***Y*** to default the view to the specific department that the service user belongs to or ***No*** to not restrict the user.

Select ***Enter*** from the command line to save the changes.

The information that appears in the *Loc* field in the Pre-Delivery Control screen will inform the Stock Controller where the vehicle is physically located, for example, Pre Delivery Bay (PD Bay).
This is controlled by *User Defined Fields* (UDF) and will need to be set up in *4184 - User Defined Fields Maint* for both New and Used vehicles. Select ***4184 - User Defined Fields Maint*** and the following screen will be displayed:



Select ***N*** for New Vehicle Inventory and the following screen will be displayed:

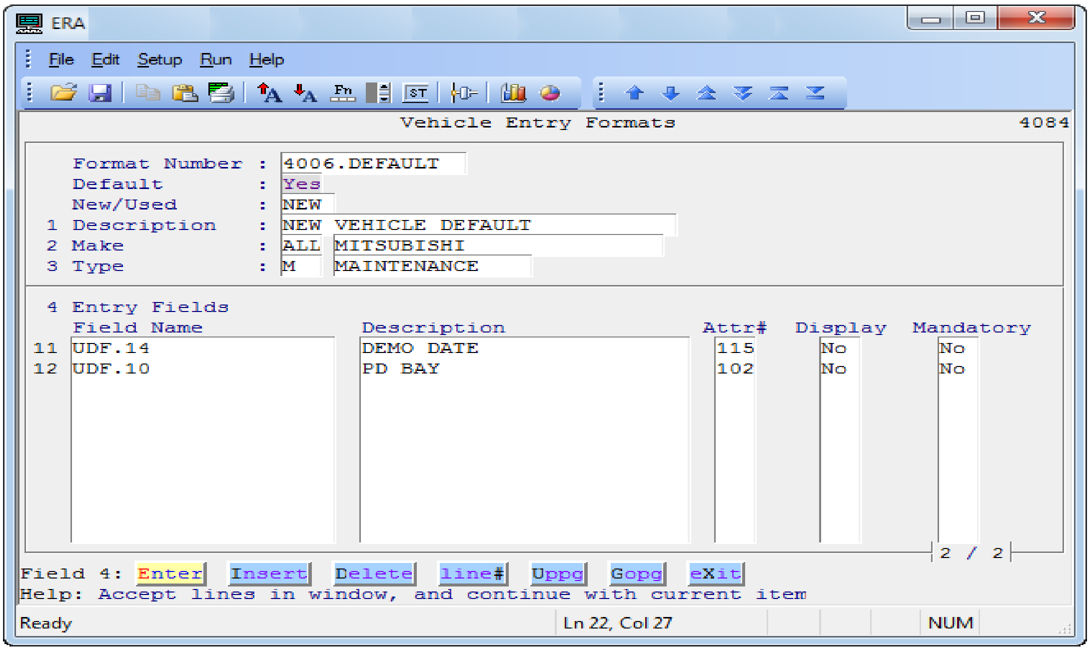


The *User Defined Field* will need to be setup as per existing functionality. The user will need to ensure that the Data Format field is setup as ***A/N*** for Alpha Numeric.

Note: It is recommended to name the *User Defined Field* as PD Bay, to make it easier to identify.

Select ***E=Enter*** from the command line to save the changes. Repeat the same process for *Used Vehicle Inventory*.

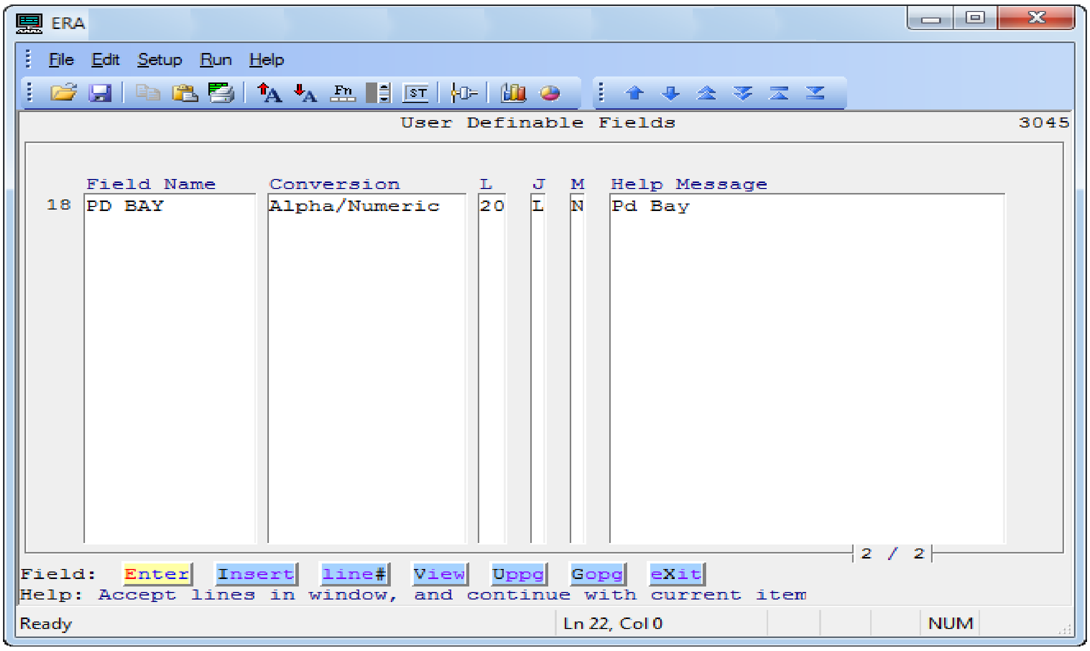
The user will now need to assign the newly created UDF to the New and Used Vehicle Format in *4084 - Vehicle Entry Formats*. Select ***4084 - Vehicle Entry Formats***, enter the ***default format number*** and the following screen will be displayed:



Select ***4 – Entry Fields***, followed by the ***Insert*** option from the command line and select the UDF created in *4184 – User Defined Fields Maint* from the ***/***Lookup as per existing functionality.

Select ***Enter*** from the command line to save the changes and repeat the same process for the *Used Vehicle Maintenance Template*.

The user will now need to create the UDF in *3045 - User Definable Fields*, option *1 - Maintain User Defined Fields*. Select ***3045 - User Definable Fields*** followed by option ***1 - Maintain User Defined Fields*** and the following screen will be displayed:

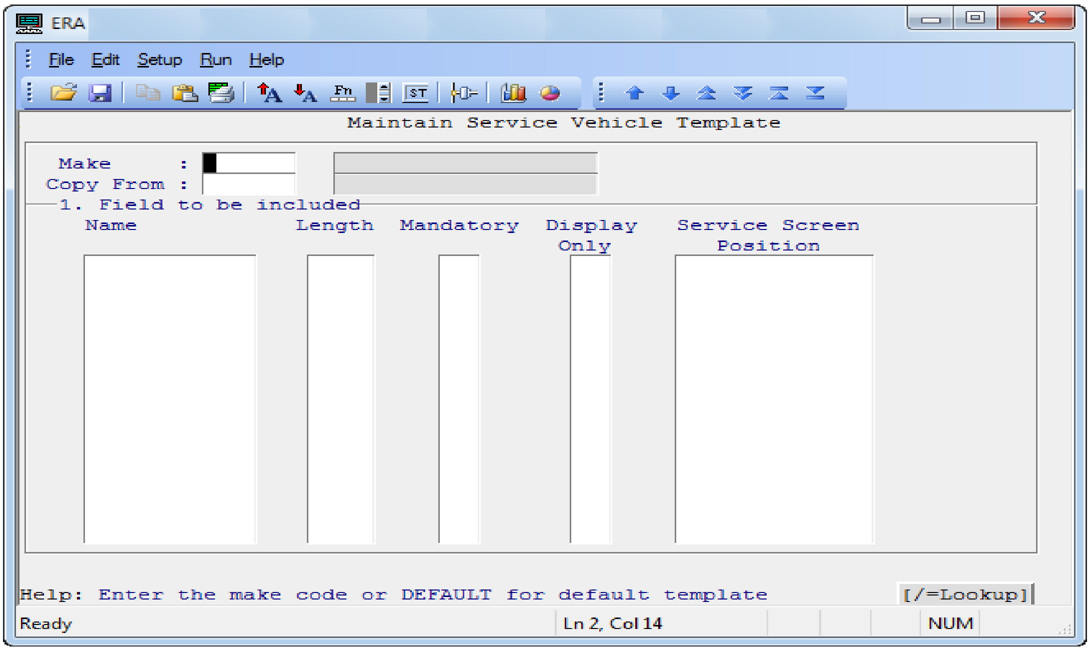


Select the ***Insert*** option from the command line and enter the ***UDF name***. Ensure that the *Conversion* field is set to ***Alpha/Numeric***.

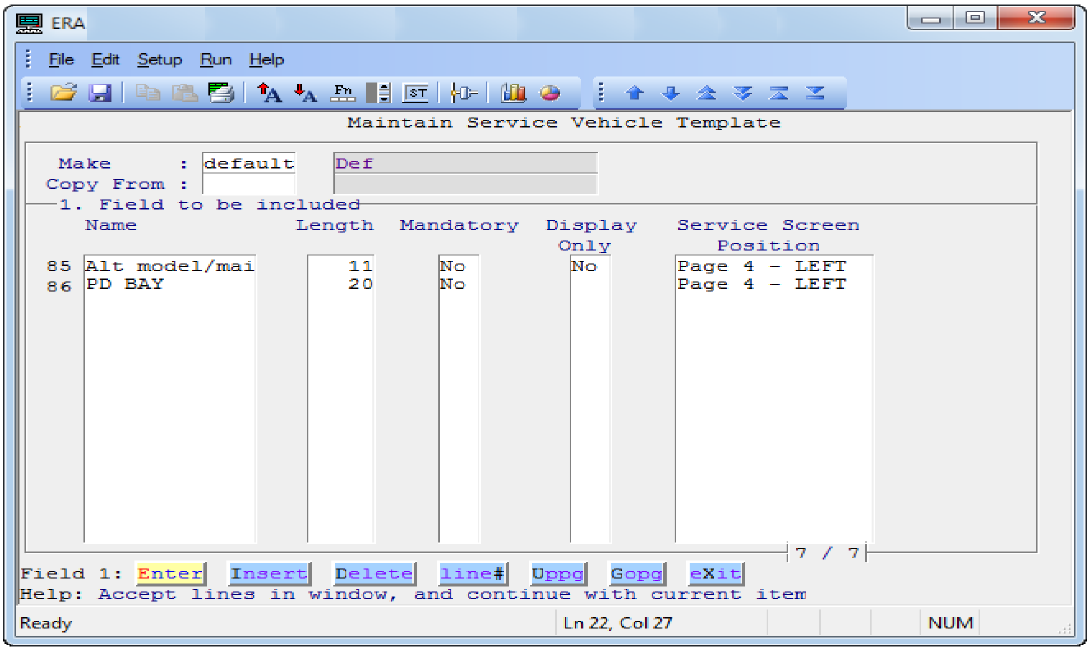
Note: It is recommended to name the *User Defined Field* as PD BAY, to make it easier to identify.

Select ***Enter*** from the command line to save the data.

The user will now need to check and ensure that the newly created UDF is displayed in the Default template in *3045 - User Definable Fields*, option *2 - Maintain Service Vehicle Template*. Select ***3045 - User Definable Fields*** followed by option ***2 - Maintain Service Vehicle Template*** and the following screen will be displayed:



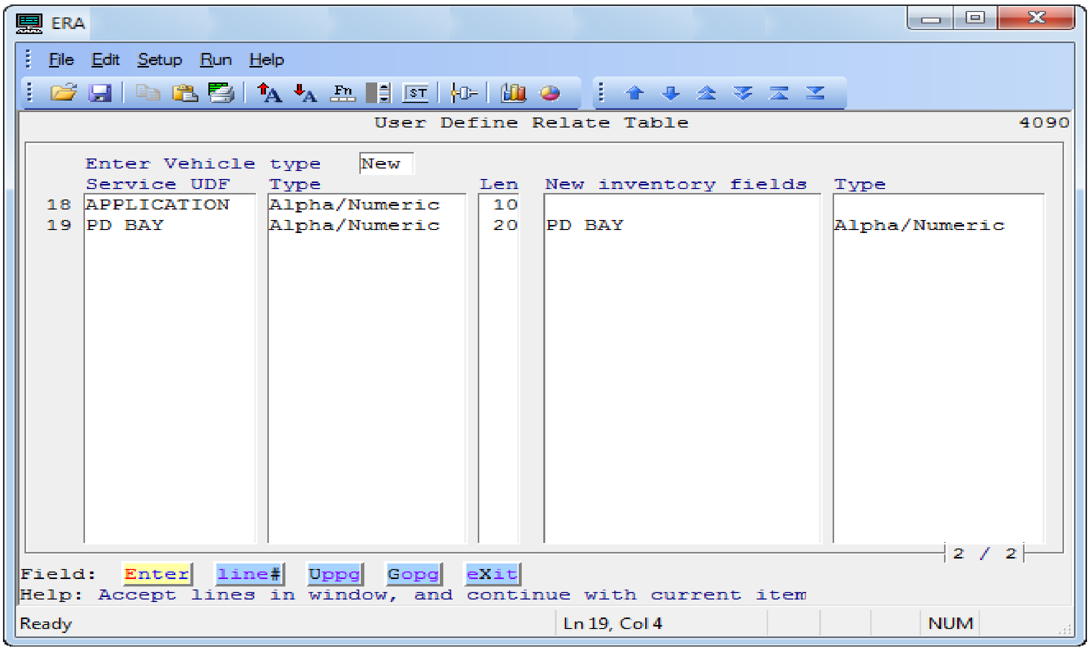
At the *Make* field enter ***DEFAULT*** and the following screen will be displayed:



The newly added UDF will be displayed. The user is able to check this by selecting ***1 – Field to be included*** and selecting the ***Nxtpg*** option from the command line to scroll to the last page.

Select the ***Enter*** option from the command line to save the changes.

The final setup is to link the Vehicle and Service UDF together. Select ***4090 – User Define Relate Table*** followed by ***N*** for New or ***U*** for Used Vehicle and the following screen will be displayed:

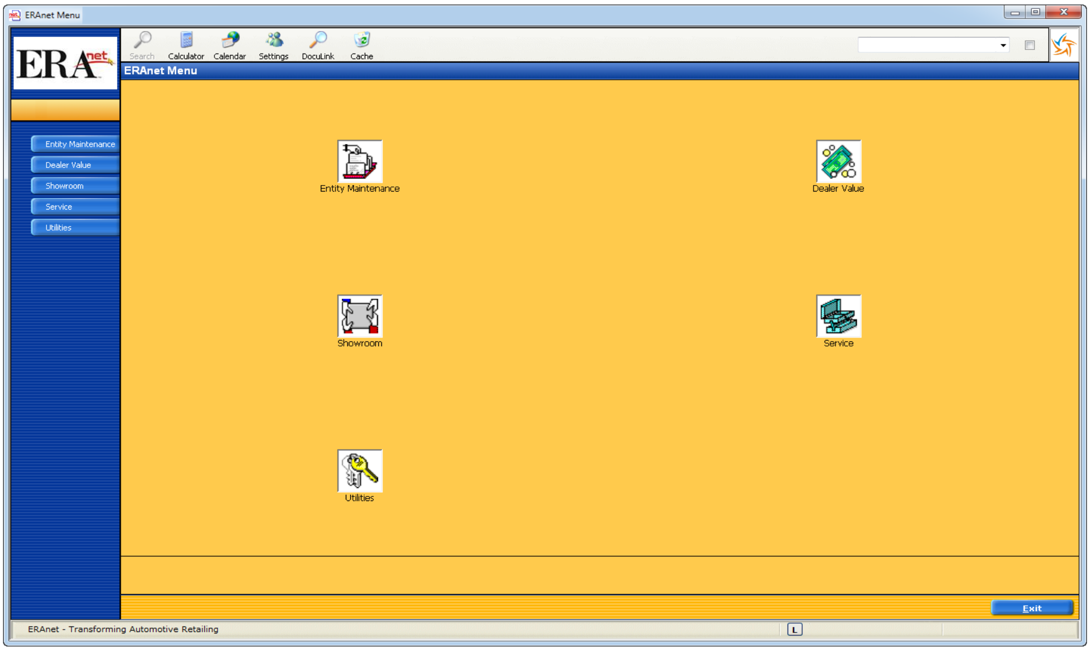


The Service UDF will already be displayed and the user will need to link it to the Vehicle UDF.

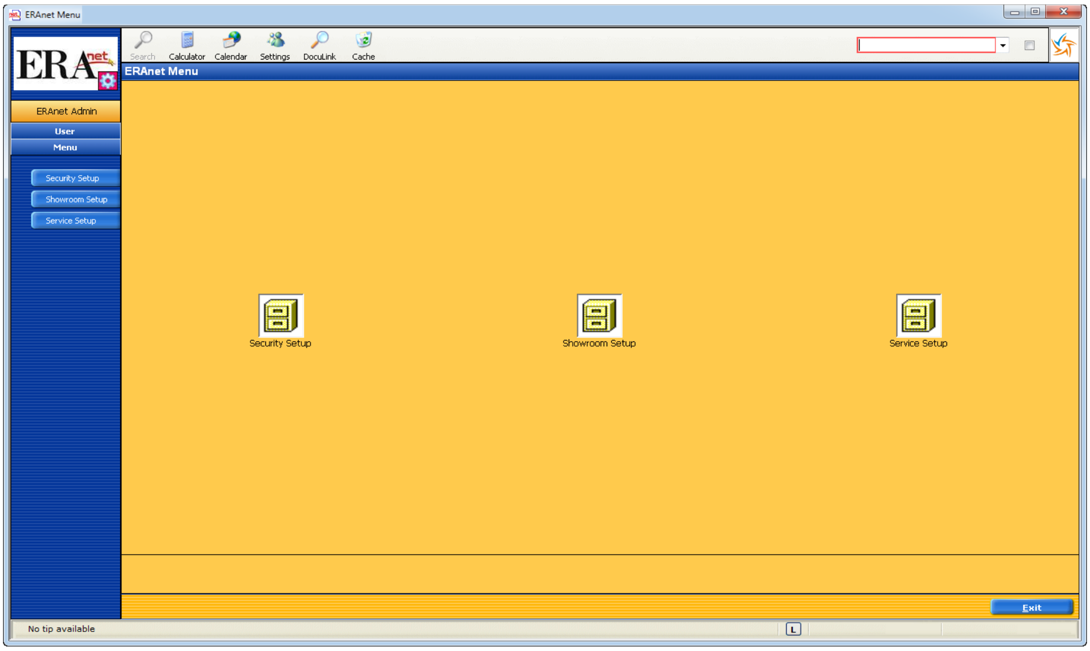
Select the relevant ***line number*** and the focus will be on the *New inventory fields* section of the relevant line. Enter the ***UDF name*** or select it from the ***/*** Lookup.

Select ***Enter*** from the command line to save the changes and repeat the same process for *Used Vehicle*.

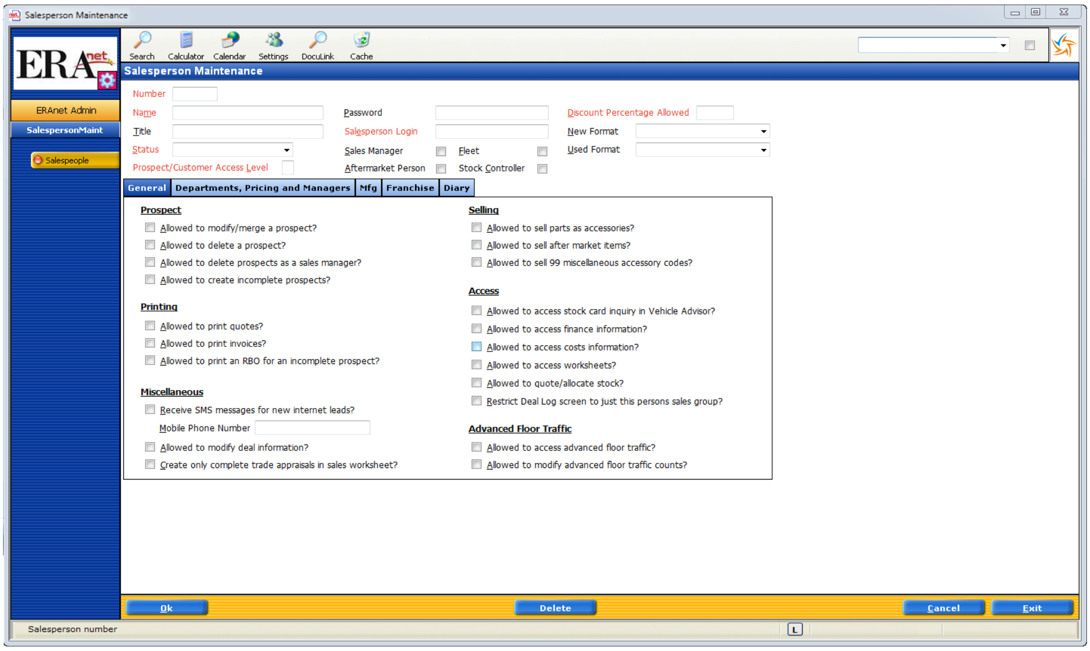
The following ERAnet setup is required to be checked and updated prior to using the Pre-Delivery system. Log to ***ERAnet*** as per existing functionality and the following screen will be displayed:



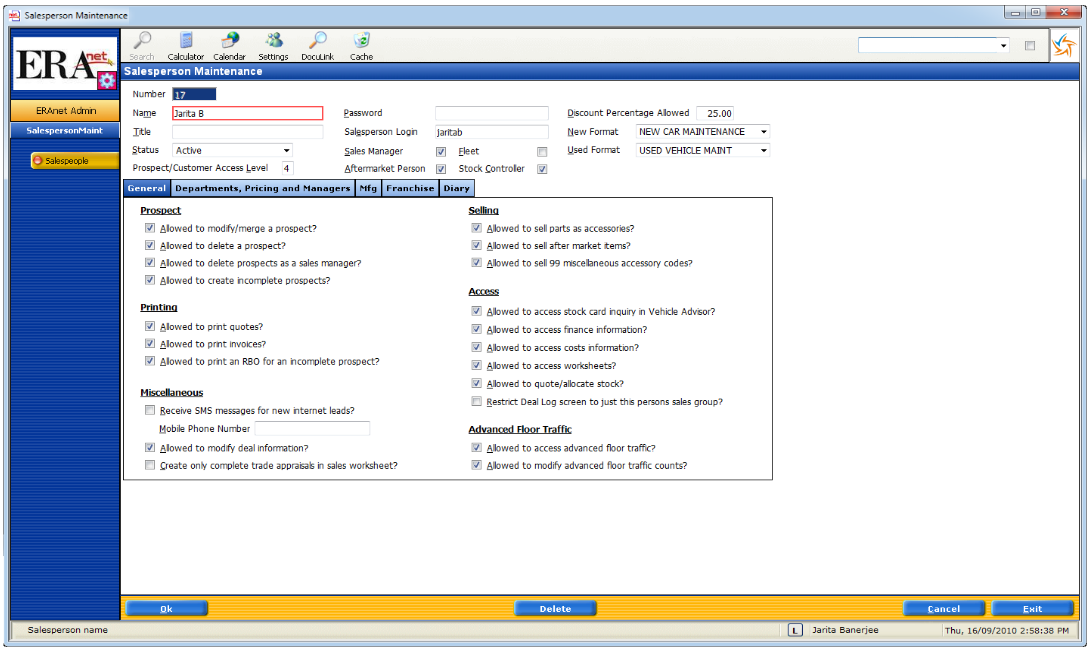
Right click on the ***Store Number*** link located on the top left corner of the screen and select the ***ERAnet Admin*** option from the list and the following screen will be displayed:



Select **_Showroom Setup_**, followed by **_Salesperson Maintenance_** and the following screen will be displayed:



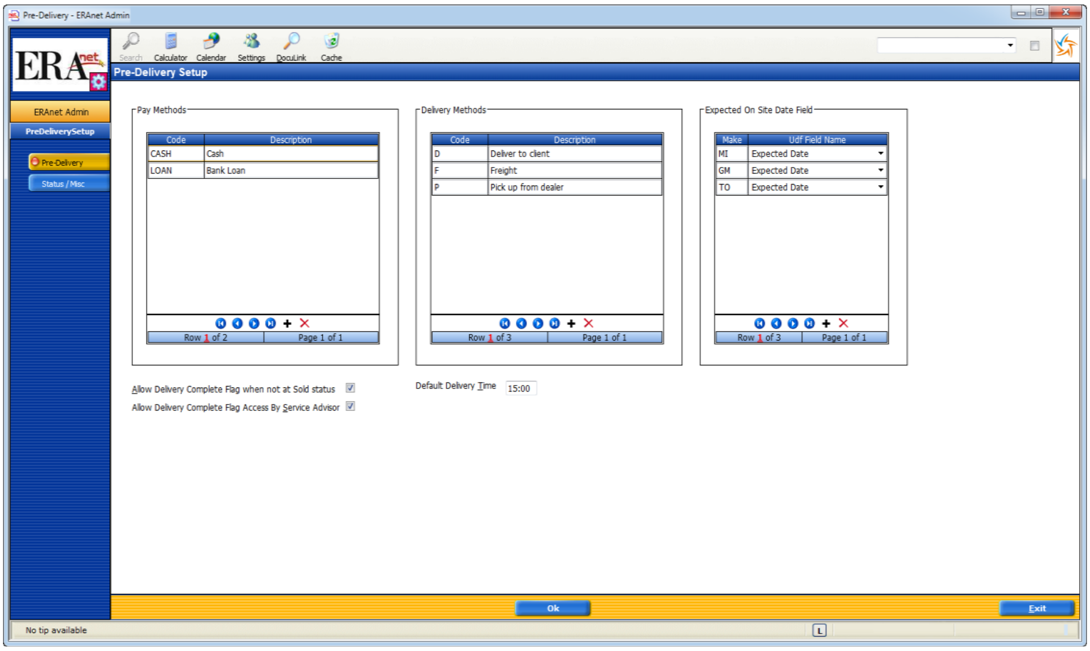
Identify each *Stock Controller* and ensure that the **_Stock Controller_** check box is selected as displayed in the following example:



Select **Ok** from the action bar to save the changes and select the **Exit** option to return to the *ERAnet Menu*.

Pre-Delivery Setups will need to be checked and updated. From the **_Showroom Setup_** menu, select **_Pre-Delivery Setup_** and the following screen will be displayed:

Note: Pay Methods are setup to confirm within Pre-Delivery how a customer is paying for their vehicle and Delivery Methods are setup to determine how a vehicle is to be delivered to a customer.



Pay Methods

Code	Enter the ***code*** to be used for the Pay Method. **Note:** The user is able to add multiple codes by selecting the + option. The user is also able to delete a code by selecting the X option.
Description	Enter the code ***description*** for the Pay Method.

Delivery Methods

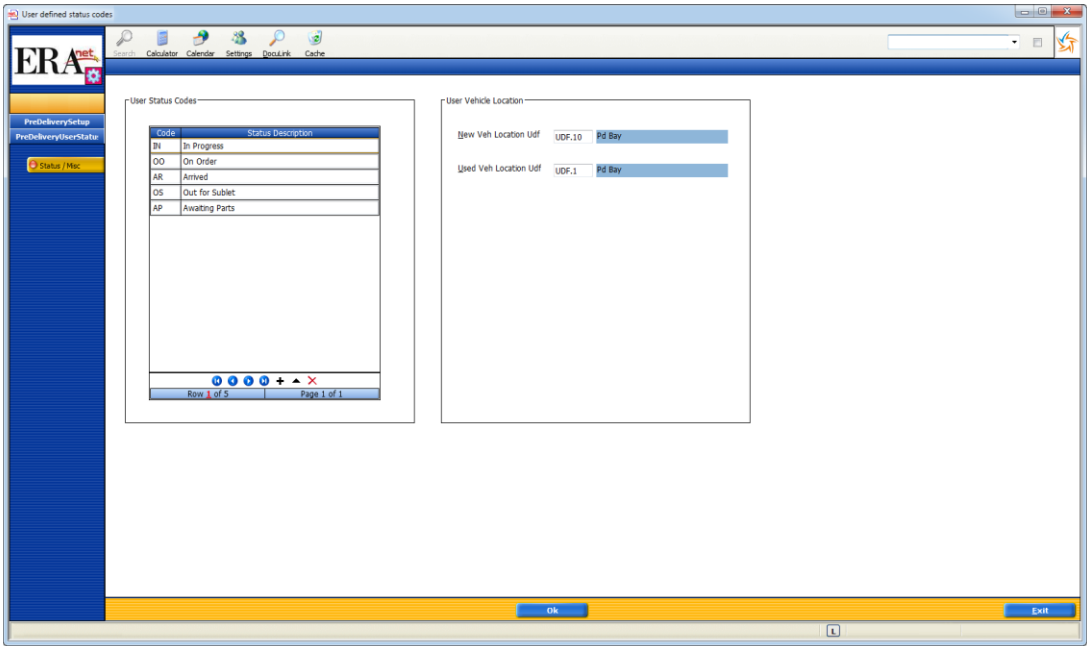
Code	Enter the ***code*** to be used for the Delivery Method. **Note:** The user is able to add multiple codes by selecting the + option. The user is also able to delete a code by selecting the X option.
Description	Enter the code ***description*** for the Delivery Method.

Expected On Site Date field

Code	Enter the ***code*** to be used for the Delivery Method. **Note:** The user is able to add multiple codes by selecting the + option. The user is also able to delete a code by selecting the X option.
UDF Field Name	Use the dropdown box to show the available fields to select from. This will display any field that is used in ***4084 – Vehicle Entry Formats*** that have the word ***Date***. **Note:** The user is able to add multiple codes by selecting the + option. The user is also able to delete a code by selecting the X option. A different field may be used for each make if required, but not recommended. If nothing is entered in this section then the ***4004 – Order Entry*** field ***8 Ext Arrvl Date*** will be used as the ***Expected On Site Date***.
Allow Delivery Complete Flag when not at Sold status	Tick this option if the *Delivery Complete Flag* can be updated without the vehicle being at a status 5 – Sold.
Default Delivery Time	Enter the default time to display for each Scheduled Delivery. If no time has been entered, then the user will be prompted to enter a ***Scheduled Delivery Time*** when each ***Scheduled Delivery Date*** is entered.
Allow Delivery Complete Flag Access By	Tick this option to allow the Service Advisor to set a deal to a *Delivery Complete*

Service Advisor	status and removing it from the *Pre-Delivery System*. The deal status does not have to be 5 – Sold in order for the Service Advisor to access the Delivery Complete option in the *Pre-Delivery Status* screen. **Note:** By default this option will be un-ticked.

Select the **Status / Misc** option from the navigation bar and the following screen will be displayed:



User Status Codes

The *User Status Codes* will inform the user where the vehicle is at in the Pre Delivery Process. The user can enter dealer specific codes and description.
Note: This is not a mandatory feature for the dealership to use.

Code	Enter the ***code*** to be used as the user status codes. **Note:** There is a limit of three characters. The user is able to add multiple codes by selecting the option. The user is also able to delete a code by selecting the option. The following is an example of codes the user can use: IN – In Progress OO – On Order AR – Arrived OS – Out for Sublet AP – Awaiting Parts
Status Description	Enter the code ***description*** for the user status codes.

User Vehicle Location

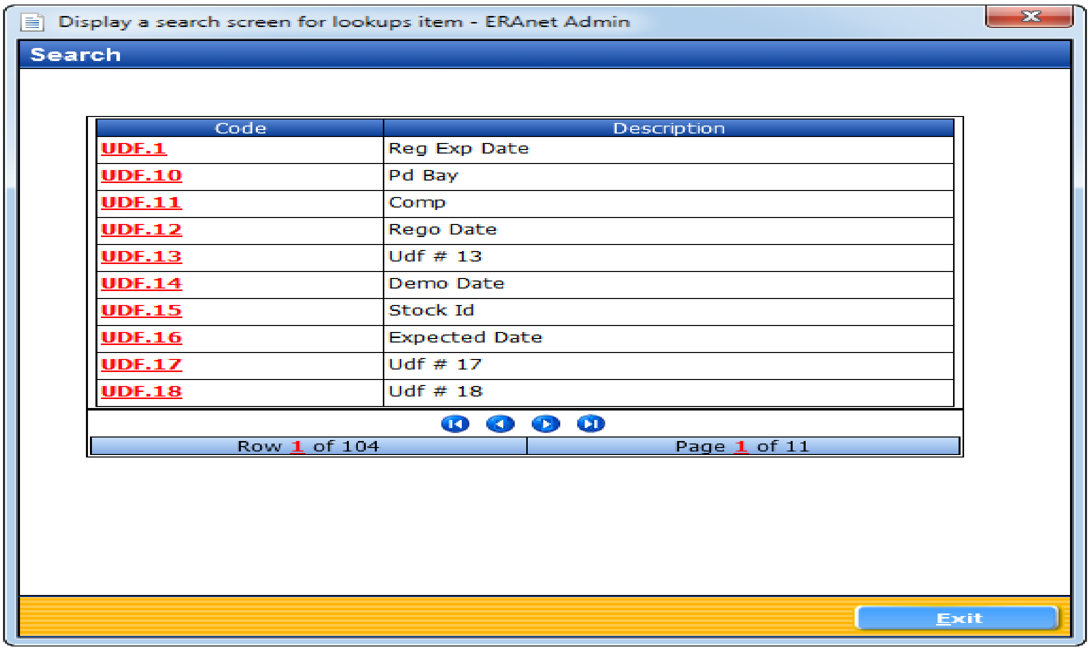
The information that appears in the *Loc* field in the Pre-Delivery Control will inform the Stock Controller where the vehicle is physically located, for example PD Bay.

Note: This step is a very important step which will determine how the pre-delivery systems work for those dealerships using this *Loc* feature.

New Veh Location Udf	Select the ***Search*** option or ***F3*** from the keyboard to assign the ***UDF*** created in *4184 - User Defined Fields Maint* for New Vehicle. **Note:** The user is also able to enter the UDF name. However, the field name will

	need to be the name that is recognised in the system level. For this reason, searching for the UDF will be a better option.
Used Veh Location Udf	Select the ***Search*** option or ***F3*** from the keyboard to assign the ***UDF*** created in *4184 - User Defined Fields Maint* for Used Vehicle. **Note:** The user is also able to enter the UDF name. However, the field name will need to be the name that is recognised in the system level. For this reason, searching for the UDF will be a better option.

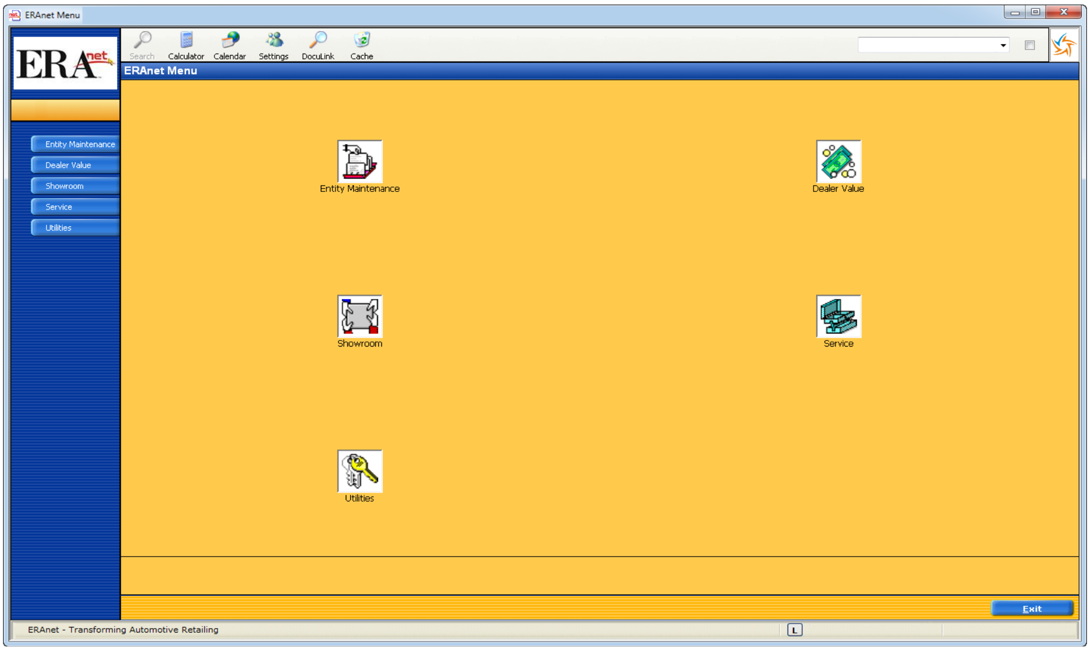
Selecting the ***Search*** option or ***F3*** from the keyboard will display the following pop up screen:



Select the relevant UDF code as per *4184 – User Defined Fields Maint* setup and return to the Status / Misc screen or Exit to return to the Status / Misc screen without selecting an UDF.

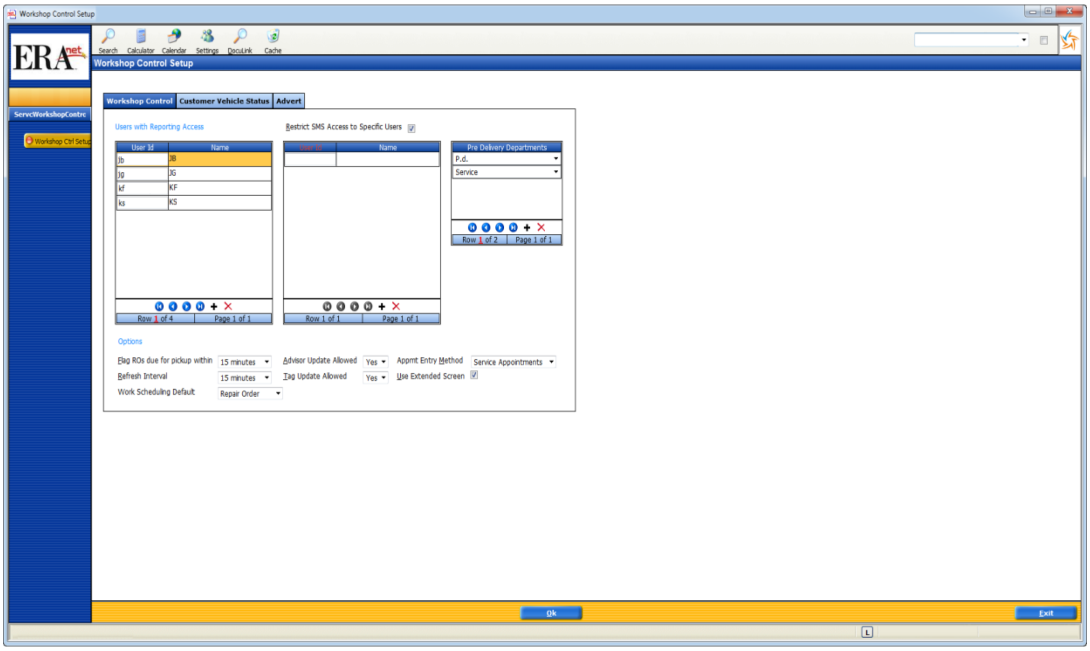
Select the Ok option from the action bar to save the changes or select Exit to return to the *Pre-Delivery Setup* screen without saving any changes.

From the ***ERAnet Menu (Showroom Setup)*** screen ***Right click*** on the ***ERAnet Admin*** link located on the top left corner of the screen and select the relevant ***Store Number*** option from the list and the following screen will be displayed:



The user will need to ensure that *Service Appointments* is selected as the default entry point when creating appointment, quotes and repair orders.

Select ***Service***, ***Workshop Control Menu*** followed by ***Workshop Control Setup*** and the following screen will be displayed:

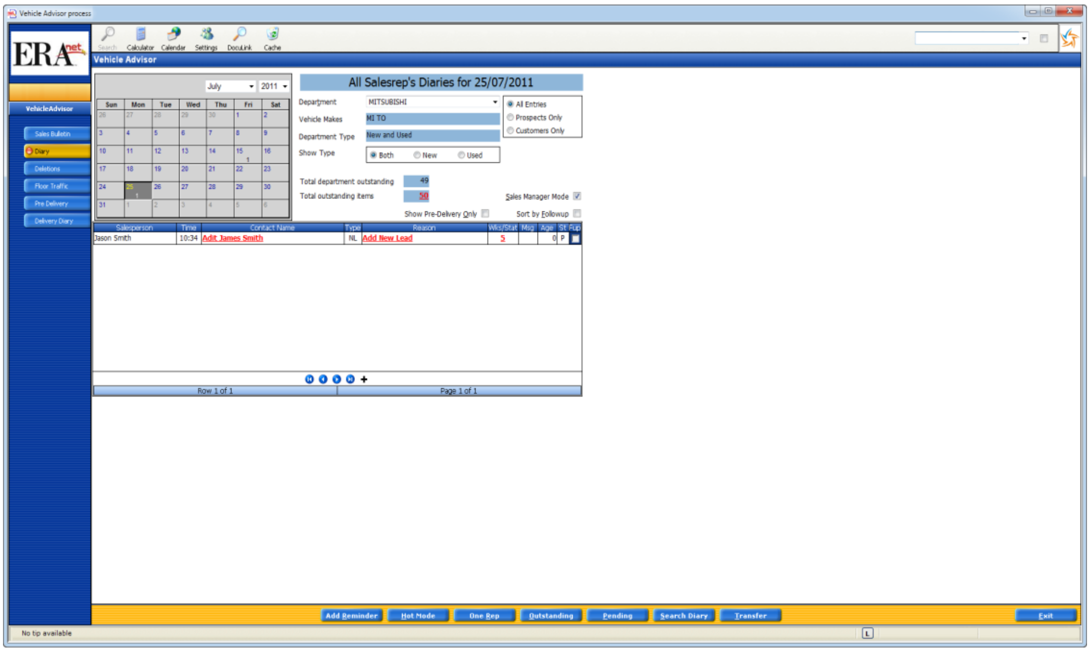


At the *Appmt Entry Method* field, select ***Service Appointments*** from the dropdown list and save the changes by selecting the **Ok** option from the action bar.

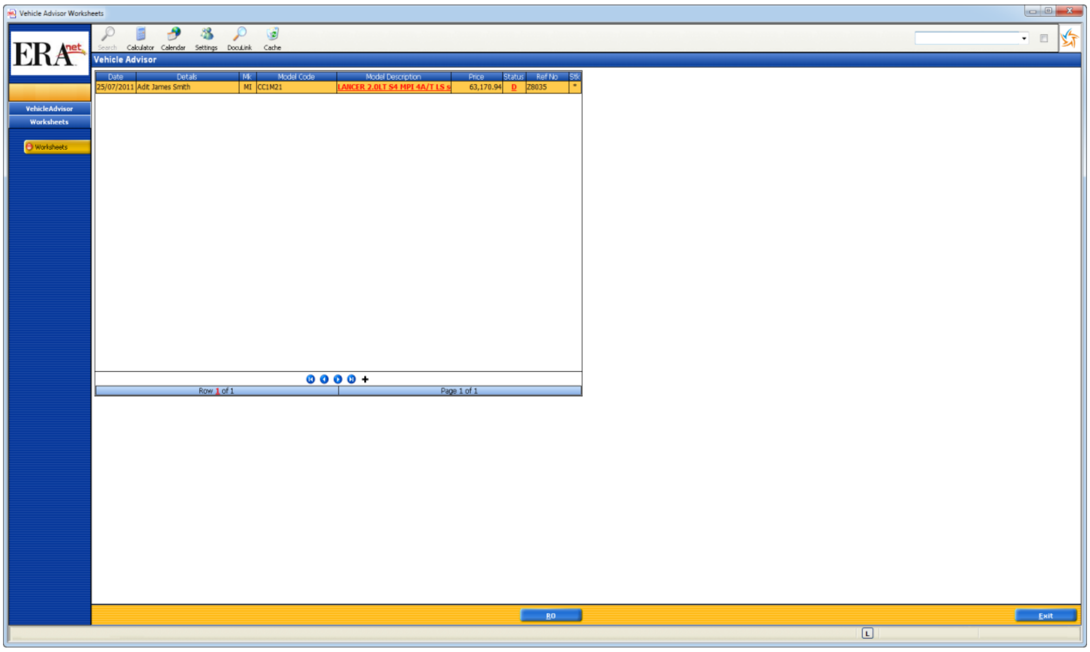
The Process

Within ERAnet *Vehicle Advisor* a deal is raised as per existing functionality. Once the deal has been created the Sales Manager will then need to approve the deal through Sale Managers Mode in order for it to appear in *Pre-Delivery*.

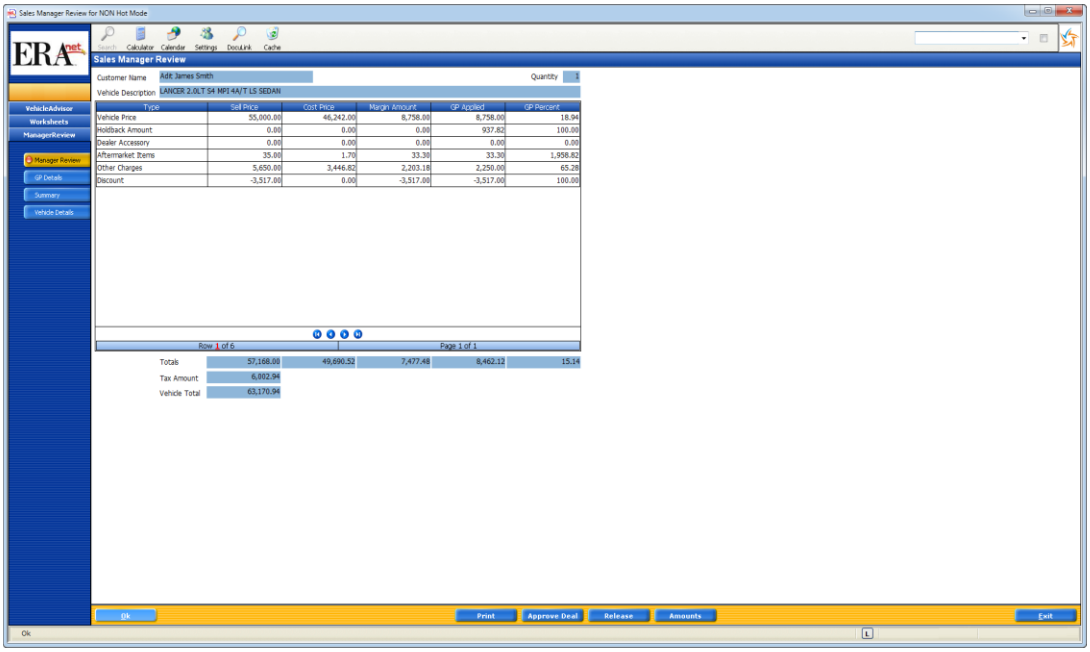
To approve a deal, log in as a ***Sales Manager*** as per existing functionality and the following screen will be displayed:



Select the relevant customer by clicking on the **Wks/Stat** hyperlink and the following screen will be displayed:

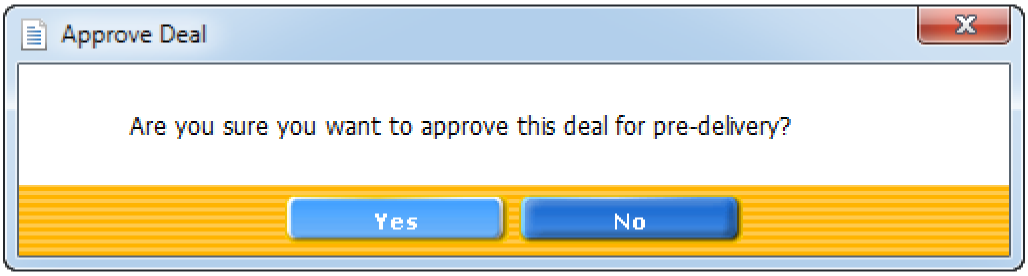


Click on the relevant **Model Description** hyperlink and the following screen will be displayed:



A new option has been added to the action bar to allow the Sales Manager to approve a deal.

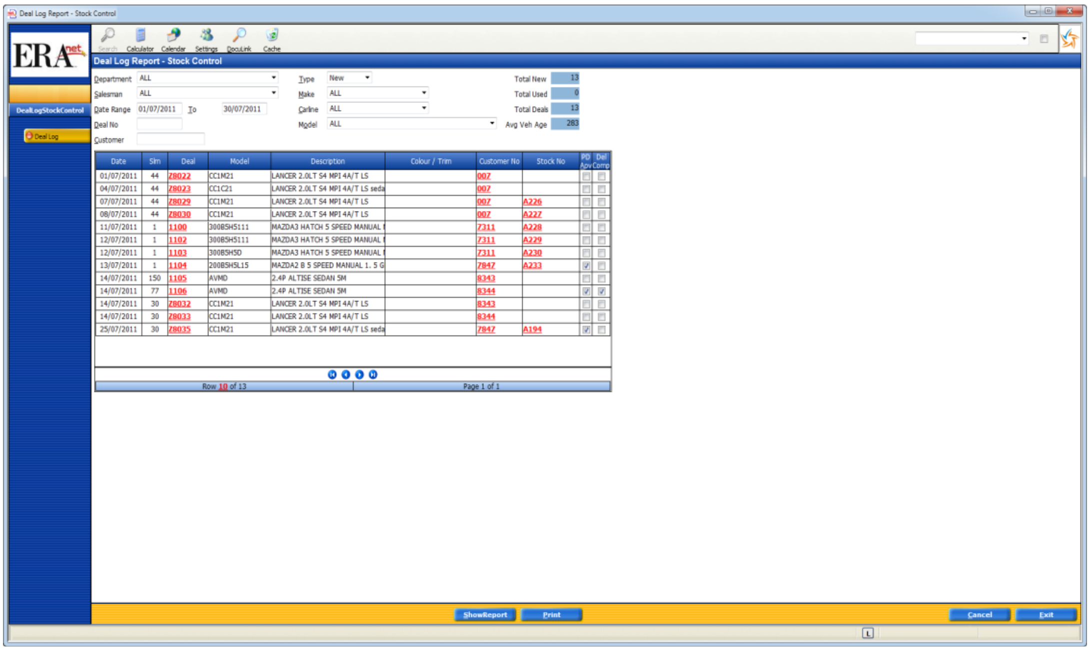
Select the **Approve Deal** option from the action bar and the following pop up will be displayed:



Select **Yes** to approve the deal and return to the *Sales Manager Review* screen or **No** to not approve it. Selecting the *Yes* option will send the deal through to Pre-Delivery.
Select **Ok** from the *Sales Manager Review* screen and exit as per existing functionality.

A new feature has been added to the *Deal Log Report* within *Showroom* to save users time when there are multiple deals that need to be approved for Pre-delivery.

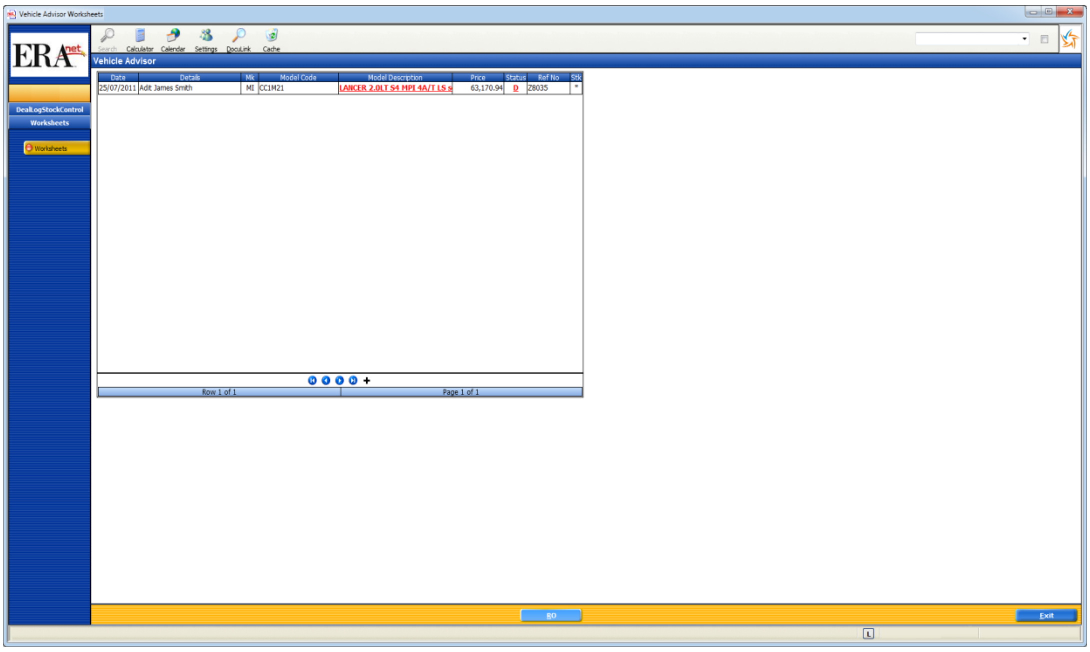
Select ***Showroom*** followed by ***Showroom Analysis*** and then ***Deal Log Report – Stock Control*** or ***Deal Log Report – Sales Manager*** and the following screen will display as per existing functionality:



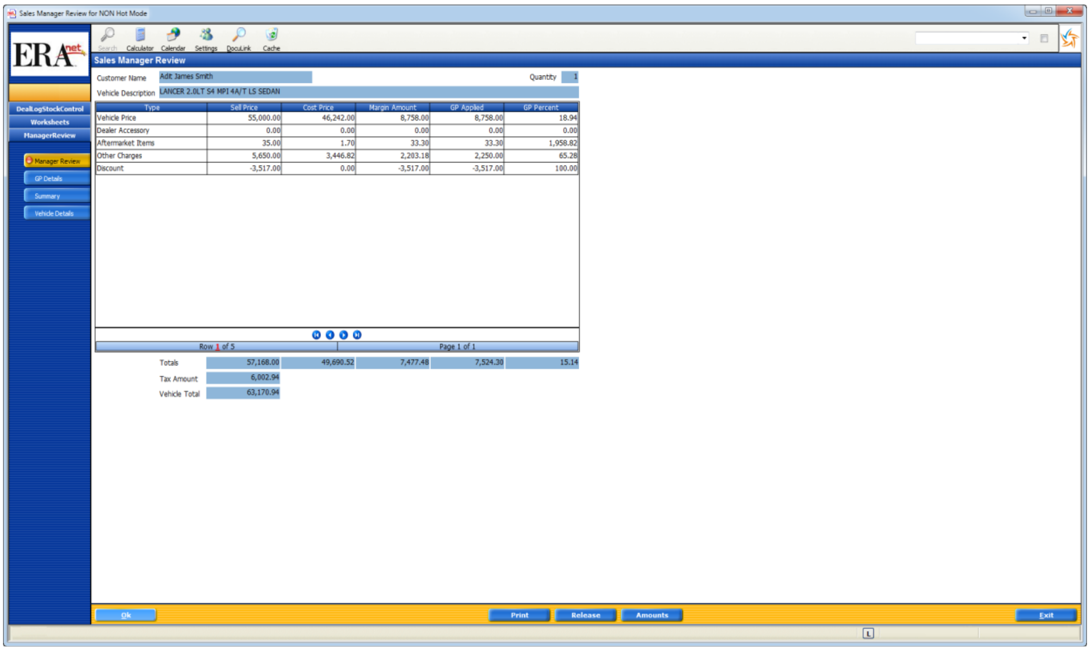
Two new columns have been added to this report.

PD Apv	Tick this option to approve a deal for Pre-Delivery instead of going through *the Sales Managers Review* screen.
Del Comp	Tick this option to complete the delivery process rather than going through the *Pre-Delivery* screen.

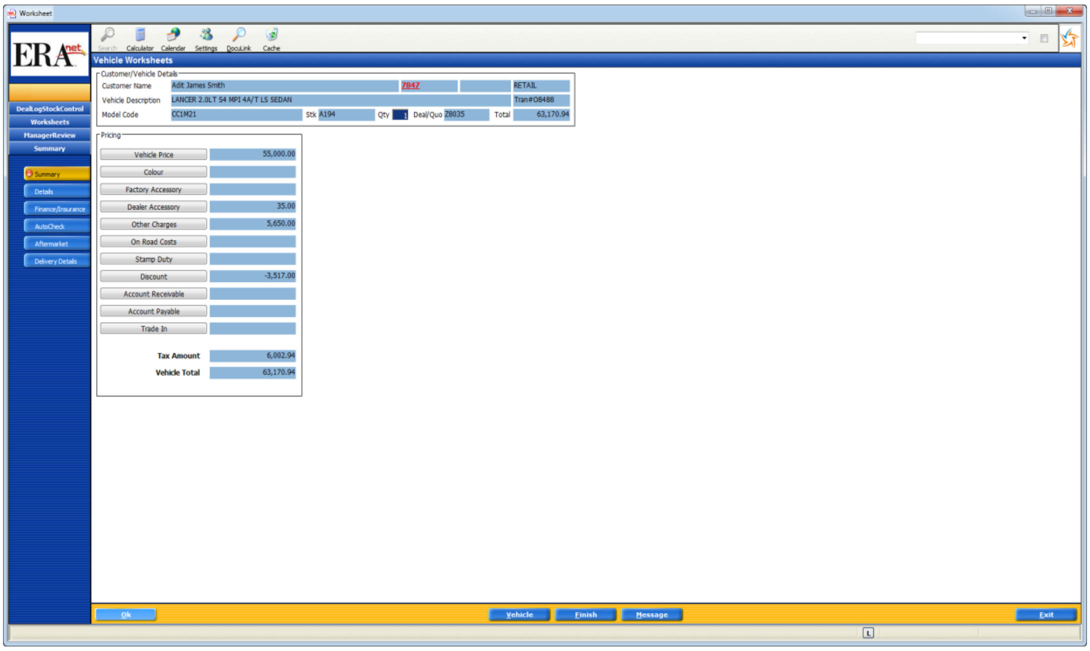
Once the user has ticked the deals to be approved, the user is able to view the *Delivery Details* by selecting the **Deal** hyperlink and the following screen will appear:



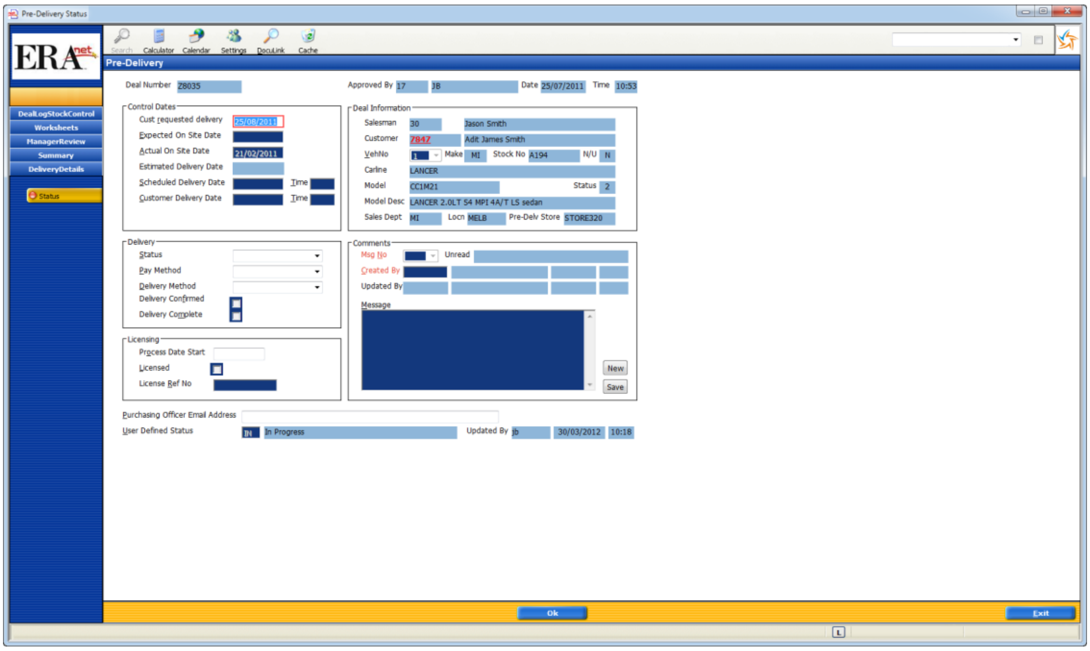
Click on the relevant **Model Description** hyperlink and the following screen will be displayed:



Select the **Summary** option from the nav bar and the following screen will be displayed:



Select the Delivery Details option from the nav bar and the following screen will be displayed:



Once in this screen the following items can be entered:

Cust requested delivery	Enter the ***date*** that the customer has requested delivery. This is an indication for the Pre-Delivery department as to when they are aiming to have the vehicle completed. **Note**: This is a requested date only and is not the final date as the Pre-Delivery department will set the *Scheduled Delivery Date* once they have scheduled all the work required.
Status	Select a ***Status*** from the dropdown box. **Note:** The Salesperson will need to enter this information.
Pay Method	Select a ***Pay Method*** from the dropdown box. This is the way final payment will be received and is allocated by the Salesperson or the Finance Manager. **Note:** The pay method is setup in *Pre-Delivery Setup* within *Showroom Setup*.
Delivery Method	Select a ***Delivery Method*** from the dropdown box. This is how the vehicle will be delivered to the customer and is allocated by the Salesperson. **Note:** The delivery method is setup in *Pre-Delivery Setup* in *Showroom Setup*.

Comments

New	Select the New button to create a new message.
Save	Select the Save button to save the message that has been created.
Msg No	The user is able to select a message to read from the dropdown box.
Unread	This field will display any unread message numbers for the user. For example: 1, 2, 3 to indicate that messages 1, 2, 3 are unread.
Created By	This field will display the user id and name of the user who created the message.
Updated By	This field will display the user id and name of the user that modified that message.
Message	The user is able to enter a detailed ***message*** as required.

Purchasing Officer Email Address	The user is able to enter the ***email address*** of a purchasing officer. This is the email address that any email can be sent to. **Note:** Once an email address has been stored within this screen it will be stored against this customer until a new email address is entered.
User Defined Status	This field will display the user status code and description as entered from the *Pre-Delivery Control* screen.
Updated By	This field will display the username, date and time when the user status code was updated.

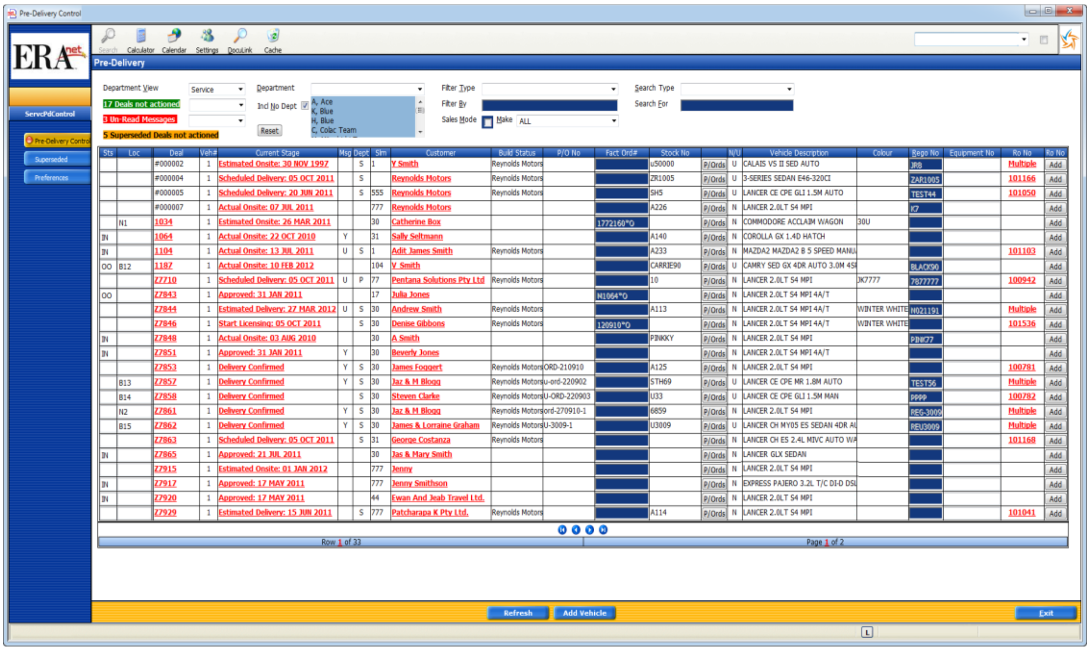
Dependent upon the user security the *Pre-Delivery* screen can be accessed from both the *Service* and the *Showroom* module.

Within the *Service* module, the Pre-Delivery interface is accessed from *Workshop Control Menu* and within the *Showroom* module, the Pre-Delivery interface is accessed from *Vehicle Inventory*, also from within *Vehicle Advisor*.

Note: The Pre-Delivery screens mentioned in this document have been accessed from the *Service* module.

From the ***Service*** module, select ***Workshop Control Menu*** followed by ***Pre-Delivery*** and the following screen will be displayed:

Note: The user may need to scroll across the page to view all the fields by selecting the arrows.



The *Department View* that is experienced upon the initial entry is dependent on the User Security, Salesperson setup and Service Advisor setup.

Users set up as a salesperson or have been identified as a stock controller will have the Department View field default to Vehicle Sales. Users set up with a default advisor in *6210 - Maintain User Security*, question *23 – Service Options* will have the Department View field default to Service.

Department View	This field will either display ***Service*** or ***Vehicle Sales***, depending on the user setup.

	The user is able to select a different department view by selecting from the dropdown box.
Deals not actioned	This field will display the number of deals that don't have any user status code assigned to it. The user is able to select a ***deal*** from the dropdown box and the focus will be on that line. When a deal number is selected, the counter will decrease. If the user deletes a status code, the counter will increase.
Un-Read Messages	This field will display any deals that have un-read messages attached to it. The user is able to select a ***deal*** from the dropdown box and a pop up screen will display. When a deal number is selected, the counter will decrease.
Superseded Deals not actioned	This field will highlight the number of superseded deals that need to be reviewed.
Department	A list of service departments will automatically be selected and displayed based on the setup in the **Preferences** screen. The user is able to remove individual departments from the search by selecting the specific department from the ***Department*** dropdown box. Select the **Reset** button to deselect all the departments. **Note:** The departments listed will depend on the Department View selected.
Incl No Dept	Tick this option to display deals that are not allocated to a service department. **Note:** It is recommended to have this option ticked.
Filter Type	Select a valid ***Filter Type*** option from the dropdown box. **Note:** The options available to select from are Salesman, Customer No, Fleet Customers which includes Government and Rental, Expected On Site Date, Customer Requested Delivery Date, Scheduled Delivery Date and User Status Code.
Filter By	Enter the filter by ***criteria*** based upon the *Filter Type* selected. **Note:** This field will be disabled until a Filter Type has been selected.
Sales Mode	This field will automatically be ticked when the user is a Sales Manager accessing the *Pre-Delivery Control* screen. **Note:** This is a view only option.
Make	This field will display the default make as selected in the **Preferences** screen. The user is able to select a different ***make*** from the dropdown box or ***All*** for all makes. Selecting a make will display deals for that make only.
Search Type	Select a valid ***Search Type*** option from the dropdown box. **Note:** The options available to select from are Deal, P/O No, Stock No, Rego No, Repair Order No and Equipment No.
Search For	Enter the search for ***criteria***. The first line that matches the criteria will be highlighted. **Note:** This field will be disabled until a Search Type has been selected.

Sts	Enter the ***User Status Code*** or select the ***Search*** option or ***F3*** from the keyboard to select a valid ***code***.
Loc	Enter the physical ***location*** of the pre-delivery vehicle. The location will inform the Stock Controller where the vehicle is physically located. For example, Bay 1. **Note:** This is a free text field and the user is able to enter any alpha numeric character. The data will be saved in *New Vehicle Maintenance* or *Used Vehicle Maintenance* as per *Pre-Delivery Setup*.
Deal	This field will display the deal number that has been approved by the Sales Manager. Any deal beginning with # indicates that is has been created by selecting the **Add**

	Vehicle option from the action bar.
Veh #	Where multiple vehicles have been assigned to the one deal number, this field will display the vehicle number for the deal.
Current Stage	This field will display the current stage of the deal along with the date. Selecting this hyperlink will take the user to the *Pre-Delivery Status* screen.
Msg	This field will display *Y* for Yes when a message has been read or a *U* for any unread messages that have been attached to the deal.
Dept	This field will display the department. **Note:** This will display the Sales departments for the deal if being viewed in *Vehicle Sales* mode or it will display the Service departments for any repair orders that have been raised if viewed in *Service* mode.
Slm	This field will display the salesperson number for the deal.
Customer	This field will display the customer name that is attached to the deal.
Cust Type	This field will display the type of sale and is only available in Sales Mode. For example: Retail, Fleet, Demo.
Build Status	This will display the name of any sublet supplier when the vehicle is out to sublet and is available only in Pre-Delivery Mode.
P/O No	This field will display the customer purchase order number for the deal. **Note:** This is the customer order number as entered in the *Modify Print Specific RBO details* screen within the Worksheet screen.
Fact Ord#	This field will display the order number for the vehicle.
Stock No	This field will display the stock number attached to the deal. **Note:** Deals that have both order numbers and stock numbers allocated will only display the stock number in the *Pre-Delivery Control* screen. The order number field will then become blank.
P/Ords	Select the **P/Ords** button to display any Purchase Orders that have been created via *6973 Purchase Order Creation/Maint*.
N/U	This field will display N for New vehicle deals or U for Used vehicle deals.
Vehicle Description	This field will display the vehicle description.
Colour	This field will display the exterior colour of the vehicle.
Rego No	This field will display the vehicle registration number.
Equipment No	Enter a ***reference number*** supplied by the customer who has ordered the vehicle. This data is stored in the service vehicle file against the serial number of the vehicle.
Ro No	This field will either be blank or it will display the Repair Order Number for the work being performed. Deals with multiple open repair orders will display Multiple. Selecting the hyperlink will take the user to the *Repair Order Summary* screen where they are able to update details about the jobs that are attached to the repair order.
Ro No	Select the **Add** button to create a new repair order.

Navigation Bar options:

Pre-Delivery Control	Select this option to view the *Pre-Delivery Control* screen.
Superseded	Select this option to view the *Superseded* screen.
Preferences	Select this option to view the *Preferences* screen.

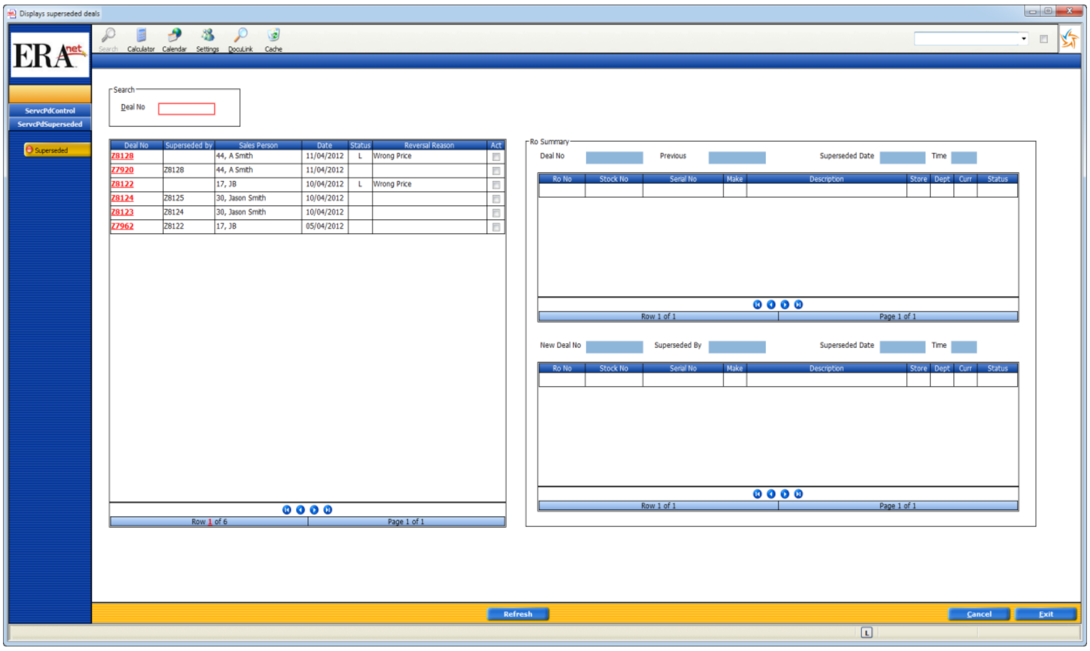
Action Bar options:

Refresh	Select this option to refresh the *Pre-Delivery Control* screen.
Add Vehicle	Select this option to add a vehicle that has come back to the dealership after it has been sold from the dealership.
Exit	Select this option to return to the *ERAnet Menu (Workshop Control Menu)*.

Superseded screen

The *Superseded* screen will allow the Service Advisor to track what has happened to a deal, for example, whether the deal has been superseded by another deal, reversed or cancelled. When a deal has been actioned, it will no longer appear in that screen. The user is also able to view and update repair orders that have been created for a superseded deal.

Note: Showroom users will also benefit from this feature as it will provide them with more information on superseded deals.
Select the **Superseded** option from the navigation bar and the following screen will be displayed:

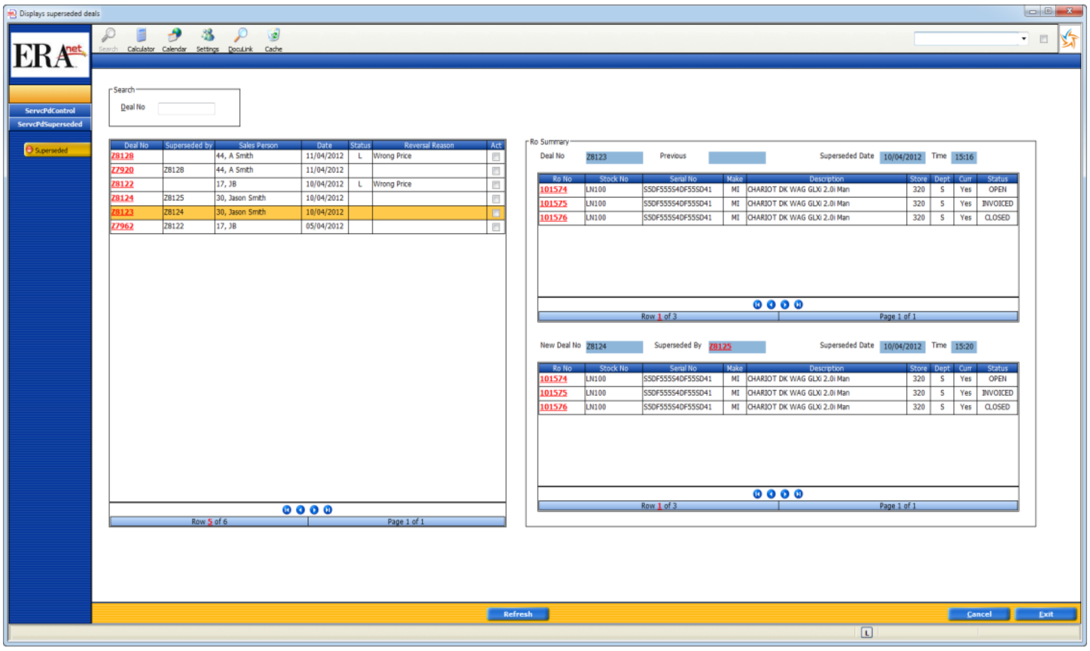


Search

Deal No	The user is able to search for a specific ***deal number*** by entering it in the Deal No field.

Deal No	This field will display the old **deal number**. Selecting this **deal number** will display the repair order summary details.
Superseded By	This field will display the superseded deal number. **Note:** This field will be blank if the deal has been reversed and is no longer attached to the worksheet.
Sales Person	This field will display the salesperson that last updated the deal number.
Date	This field will display the date the superseded deal was updated.
Status	This field will display the superseded deal status. **Note:** This field can be blank.
Reversal Reason	This field will display the reversal reason of the superseded deal. **Note:** This field can be blank.
Act	Tick this option once the superseded deal has been actioned by the user.

Selecting a **deal number** hyperlink will display the repair order summary details as displayed in the following example:



Ro Summary

Deal No	This field will display the deal number.
Previous	This field will display the previous superseded deal number. **Note:** This field will be blank when the original deal number is selected.
Superseded Date	This field will display the superseded date.
Time	This field will display the superseded time.

Ro No	This field will display the **repair order number**. The user is able to select the repair order and update repair order details.
Stock No	This field will display the stock number.
Serial No	This field will display the vehicle's serial number.
Make	This field will display the vehicle make.
Description	This field will display the vehicle description.
Store	This field will display the store the repair order was created for.
Dept	This field will display the department the repair order was created for.
Curr	This field will indicate if the vehicle is a current vehicle or not. The options displayed will either be Yes or No.
Status	This field will display the repair order status. For example: Open, Invoiced Closed.

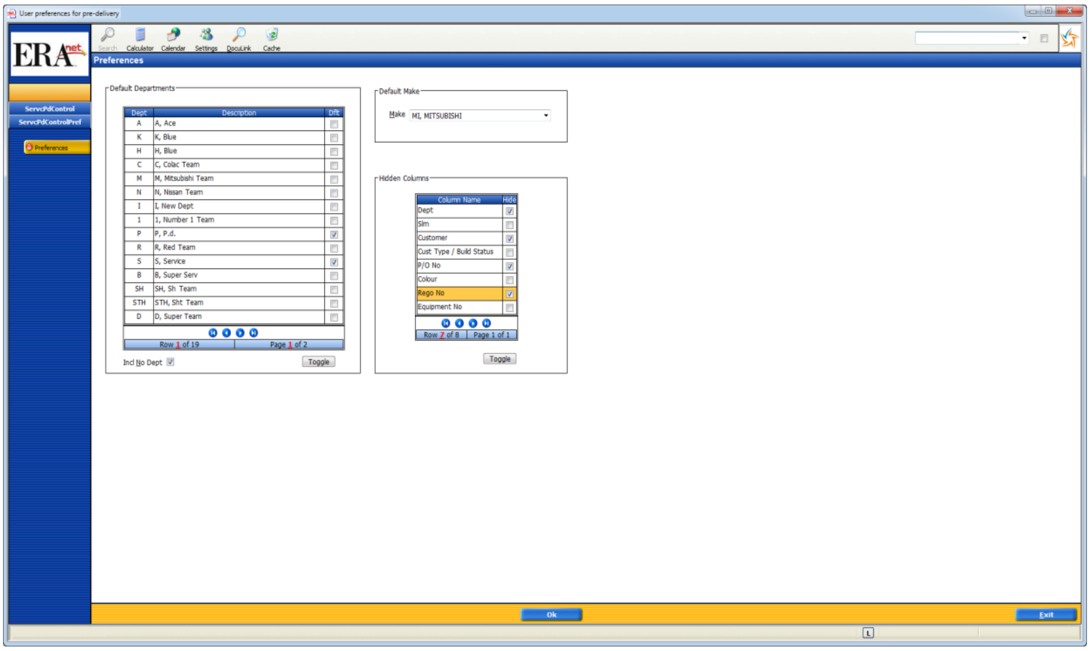
New Deal No	This field will display the new deal number.
Superseded By	This field will display any other superseded **deal number**. **Note:** The user is able to toggle between the superseded deal numbers by selecting the superseded **deal number** hyperlink.
Superseded Date	This field will display the superseded date. **Note:** This field will only display the date if there is a deal number in the above *Superseded By* field.
Time	This field will display the superseded time. **Note:** This field will only display the date if there is a deal number in the above *Superseded By* field.

Ro No	This field will display the repair order number associated with the new deal number. The user is able to select the repair order and update repair order details.
Stock No	This field will display the stock number associated with the new deal number.
Serial No	This field will display the vehicle's serial number.
Make	This field will display the vehicle's make.
Description	This field will display the vehicle description.
Store	This field will display the store the repair order was created for.
Dept	This field will display the department the repair order was created for.
Curr	This field will indicate if the vehicle is a current vehicle or not. The options displayed will either be Yes or No.
Status	This field will display the repair order status. For example: Open, Invoiced Closed.

Refresh	Select this option to refresh the screen.
Cancel	Select this option to reset the screen so that the user is able to select a superseded deal and see the details.
Exit	Select this option to return to the *Pre-Delivery Control* screen.

Preferences screen

Select the **Preferences** option from the navigation bar and the following screen will be displayed:



Default Departments

Dept	This column will display all the service departments.
Description	This column will display all service department description.
Dflt	Tick this option to select the specific service departments that will display by default in the *Pre-Delivery Control* screen.
Incl No Dept	Prior to a repair order being created, the deal does not belong to any service department. Ticking this option will allow deals that have not been assigned to a service department to be displayed in the *Pre-Delivery Control* screen. **Note:** It is recommended to have this option ticked.

Toggle	Select the Toggle button to quickly change between ticked and un-ticked for the default departments.

Default Make

Make	Select a default ***make*** from the dropdown box. This make will display in the *Pre-Delivery Control* screen by default.

Hidden Columns

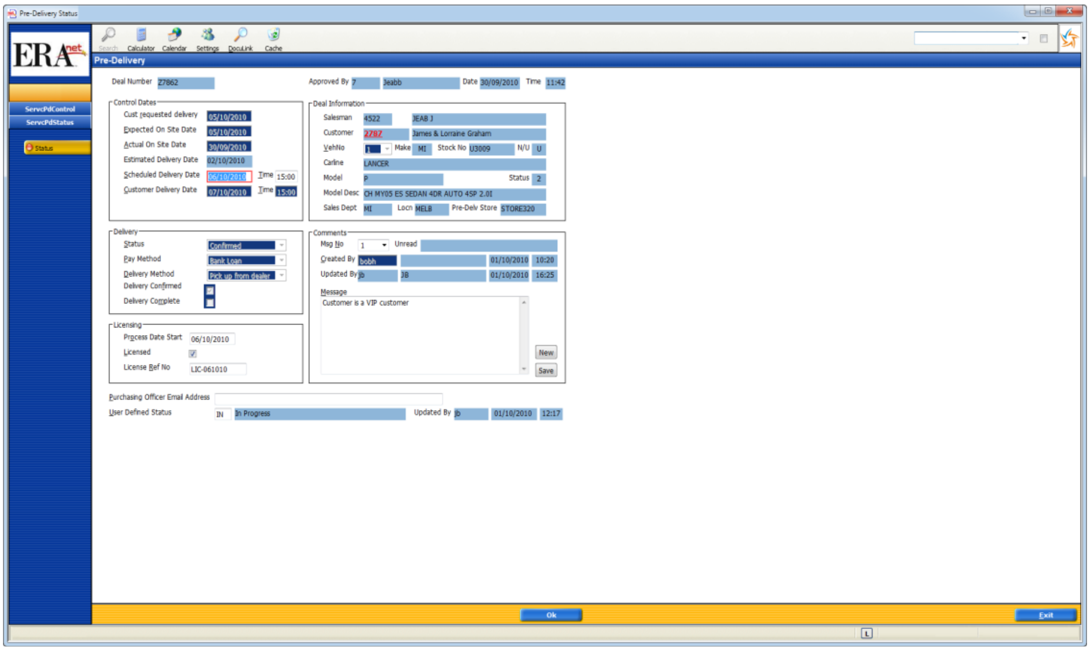
Column Name	This field will display the column names of fields that are available to be hidden in the *Pre-Delivery Control* screen.
Hide	Tick this option to select specific columns to hide in the *Pre-Delivery Control* screen. **Note:** Not all fields are available to hide.
Toggle	Select the Toggle button to quickly change between ticked and un-ticked for the hidden columns.

Select **Ok** from the action bar to save the changes or **Exit** to return to the *Pre-Delivery Control* screen without saving the changes.

Current Stage

Selecting the **Current Stage** hyperlink will display the following screen:

Note: The Pre-Delivery Status screen can also be accessed from *Vehicle Worksheet*, **Delivery Details** option from the navigation bar.



Deal Number	This field will display the Deal Number.
Approved By	This field will display the Number and Name of the Sales Manager who approved the deal.
Date	This field will display the Date the Deal was approved.
Time	This field will display the Time the Deal was approved.

Control Dates

Cust requested delivery	This field will be entered by the Sales Person and is an indication of when the customer would like delivery of the vehicle so that the Pre-Delivery Department is aware of the expectation.
Expected On Site Date	This field will display the Estimated On Site Date. This is the date that is entered at the time the vehicle is ordered through *New Vehicle Orders* and is the *Estimated Arrival* date and is entered by the Salesperson. **Note:** Depending on the user setup, this field can be enabled to enter the estimated on site date manually. This field is also able to be configured to use a different date dependent upon the set-up as per previous instructions.
Actual On Site Date	This field will display the Actual On Site Date. This is the date the vehicle arrived at the dealership and is the *Received Date* from *New Vehicle Maintenance* and *Used Vehicle Maintenance* **Note:** Depending on the user setup, this field can be enabled to enter the estimated on site date manually.
Estimated Delivery Date	This field will display the Estimated Delivery Date. This date is calculated by taking the last date from the Jobs screen and adding one to it. This is the date the service department estimates the vehicle will be ready by. This date is set by Pre-Delivery.
Scheduled Delivery Date	Enter the ***Scheduled Delivery Date***. The Pre-Delivery enters this information to indicate when the vehicle is ready for delivery for the salesperson to then confirm with the customer.
Scheduled Delivery Time	Enter the ***Time*** the vehicle will be available for delivery. **Note:** A default time can be determined via the setup in the *Pre-Delivery Setup* screen.
Customer Delivery Date	Enter the ***Customer Delivery Date***. The Salesperson enters the date to indicate when the vehicle will be delivered to the customer. **Note:** This field will be disabled until the Scheduled Delivery Date is entered.
Customer Delivery Time	Enter the ***Customer Delivery Time***. The Salesperson enters this time to indicate when the vehicle will be delivered to the customer. **Note:** The time entered is in twenty four hours.

Delivery

Status	Select a ***Status*** from the dropdown box. **Note:** The Salesperson will need to enter this information.
Pay Method	Select a ***Pay Method*** from the dropdown box. This is the way final payment will be received and is allocated by the Salesperson or the Finance Manager. **Note:** The pay method is setup in *Pre-Delivery Setup* within *Showroom Setup*.
Delivery Method	Select a ***Delivery Method*** from the dropdown box. This is how the vehicle will be delivered to the customer and is allocated by the Salesperson. **Note:** The delivery method is setup in *Pre-Delivery Setup* in *Showroom Setup*.
Delivery Confirmed	When the delivery has been confirmed, the Salesperson is required to tick the ***Delivery Confirmed*** check box. **Note:** Selecting this option will allow the Stock Controller to proceed with entering the Licensing information.
Delivery Complete	When the vehicle has been sold to the customer, the Sales Manager or the Stock Controller is required to tick the ***Delivery Complete*** check box. This field will remain disabled until the vehicle status is 5 for Sold or setup question *Allow Delivery Complete Flag when not at Sold status* in *Pre-Delivery Setup* is

	ticked. There is a setup question in *Pre-Delivery Setup* which allows the Service Advisor to tick the ***Delivery Complete*** check box. The vehicle status in this case does not have to be 5 for Sold.

Licensing

Process Date Start	Enter the ***date*** that Licensing has been performed. This function is performed by the Stock Controller or Licensing Clerk.
Licensed	The Stock Controller is required to tick the ***Licensed*** check box when the vehicle has been licensed. **Note:** This field will be disabled until the *Process Date Start* date has been entered.
License Ref No	The Stock Controller is required to enter the document ***reference number*** for the registration.

Deal Information

Salesman	This field will display the salesperson number and name.
Customer	This field will display the **customer number** and the name. **Note:** Selecting the **customer number** hyperlink will take the user to the *Entity Customer Details Display* screen. Within this screen the user will also have the ability to SMS or Email a customer in relation to the status of their Deal.
VehNo	Where multiple vehicles have been assigned to the one deal number, this field will display the vehicle number for the deal.
Make	This field will display the vehicle make.
Stock No	This field will display the factory order number or the stock number of the vehicle.
New/Used	This field will display N for New vehicle or U for Used vehicle.
Carline	This field will display the carline of the vehicle.
Model	This field will display the model of the vehicle.
Status	This field will display the vehicle status. For example, 1 for In Stock, 2 for Deal Pending, 5 for Sold.
Model Desc	This field will display the model description of the vehicle.
Sales Dept	This field will display the sales department for this deal.
Locn	This field will display the vehicle location as per the location field in *New Vehicle Maintenance* and *Used Vehicle Maintenance*.
Pre-Delv Store	This field will display the Pre-Delivery store number based upon the sales department setup.

Comments

New	Select the **New** button to create a new message.
Save	Select the **Save** button to save the message that has been created.
Msg No	The user is able to select a message to read from the dropdown box.
Unread	This field will display any unread message numbers for the user. For example: 1, 2, 3 to indicate that messages 1, 2, 3 are unread.
Created By	This will display the user id and name of the user who created the message.
Updated By	This will display the user id and name of the user that modified that message.
Message	The user is able to enter a detailed ***message*** as required.

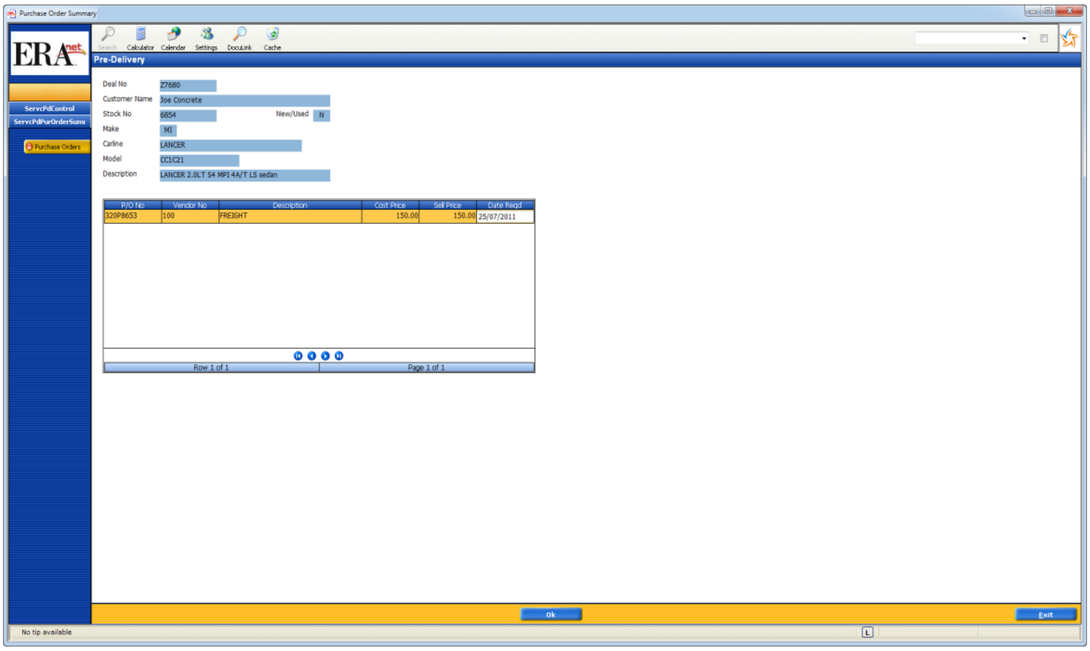
Purchasing Officer Email Address	The user is able to enter the ***email address*** of a purchasing officer. This is the email address that any email can be sent to. **Note:** Once an email address has been stored within this screen it will be stored

	against this customer until a new email address is entered.
User Defined Status	This field will display the user status code and description as entered from the *Pre-Delivery Control* screen. The user is also able to update the ***User Status Code***.
Updated By	This field will display the username, date and time when the user status code was updated.

Select **Ok** from the action bar to save the changes or **Exit** to return to the *Pre-Delivery Control* screen without saving any details.

P/Ords

The user is able to update the required date of Purchase Orders that have been raised against this vehicle. Select the **P/Ords** button and the following screen will be displayed:



Deal No	This field will display the *deal number*.
Customer Name	This field will display the *customer name*.
Stock No	This field will display the *stock number*.
New/Used	This field will display the vehicle as a *new* or *used* vehicle.
Make	This will display the *make* of the vehicle.
Carline	This will display the *description* of the carline for this vehicle.
Model	This will display the *model number* of the vehicle.
Description	This field will display the *description* of the vehicle.

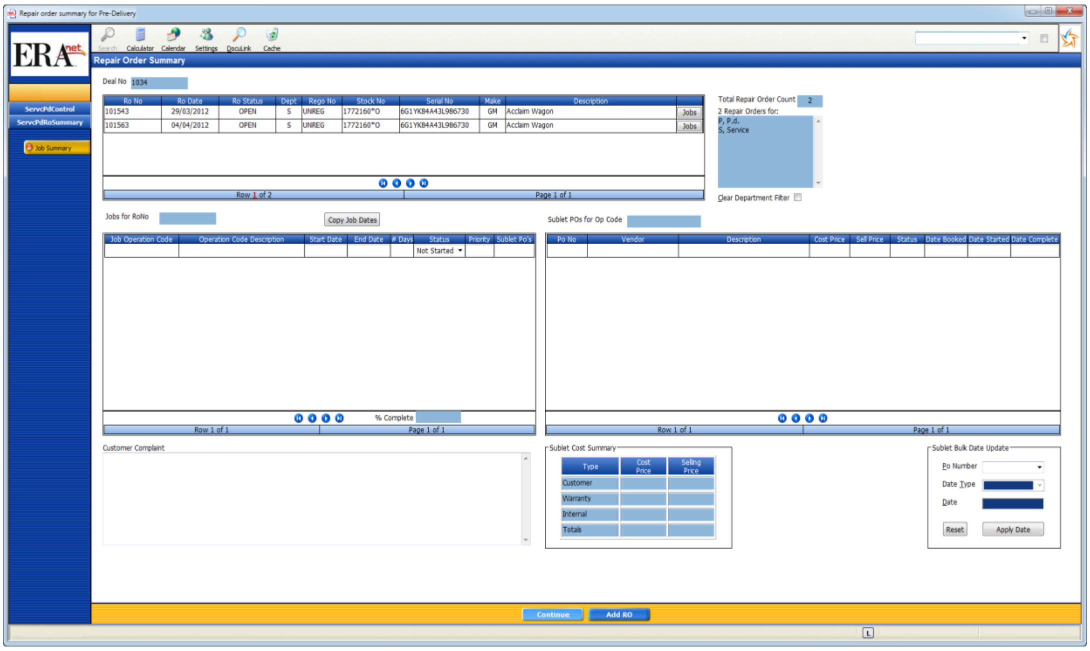
P/O No	This field will display the *purchase order number* allocated to this vehicle.
Vendor No	This field will display the *vendor number* attached to this Purchase Order.
Description	This field will display the *description* of the goods required on this Purchase Order.
Cost Price	This field will display the estimated *cost price* of the goods for this purchase order.
Sell Price	This field will display the estimated *sell price* of the goods for this purchase order.
Date Required	This field will display the *date required* as entered on the purchase order and can be modified by entering a new ***date***.

Select **Ok** from the action bar to save the changes or **Exit** to return to the *Pre-Delivery Control* screen without saving any details.

Ro No

The user is able to review or update a repair order attached to the selected deal. Select the **Repair Order** hyperlink and the following screen will be displayed:

Note: Deals with multiple repair orders attached will display **Multiple** in the *Ro No* field.



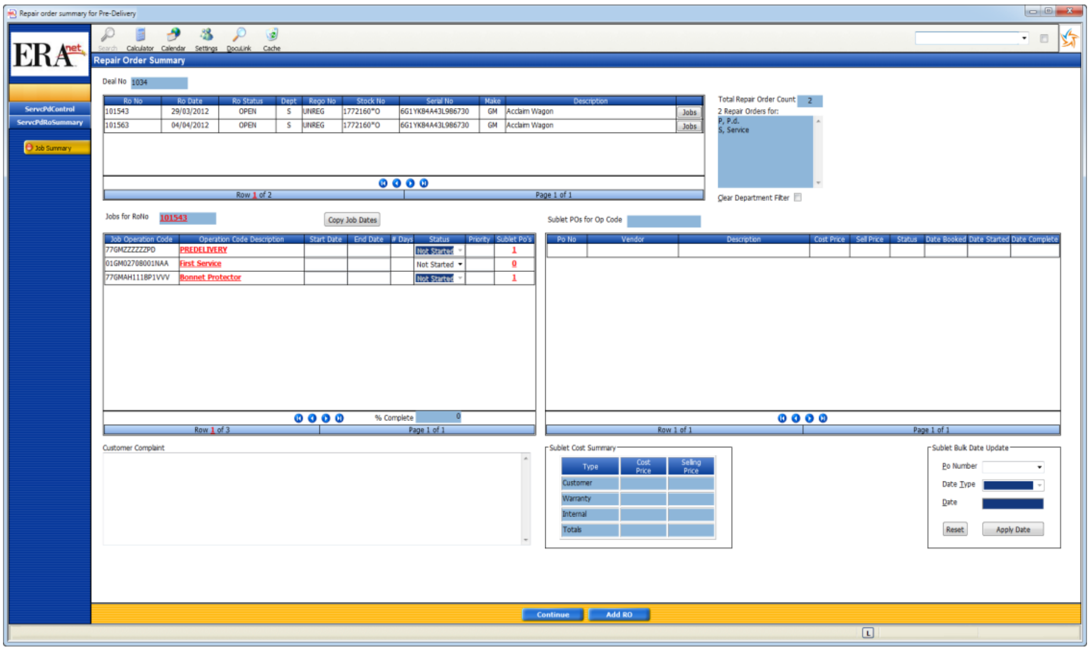
Deal No	This field will display the deal number.

Ro No	This field will display the repair order number.
Ro Date	This field will display the repair order date.
Ro Status	This field will display the repair order status.
Dept	This field will display the department the repair order was created for.
Rego No	This field will display the vehicle's registration number. **Note:** Vehicles that are on order may not have a registration number assigned to it, so this field may be blank.
Stock No	This field will display the stock number.
Serial No	This field will display the vehicle's serial number.
Make	This field will display the vehicle make.
Description	This field will display the vehicle description.
Jobs	Select the **Jobs** button to display a list of jobs that are assigned to the repair order.

Total Repair Order Count	This field will display the total number of repair orders attached to that deal.
Repair Order for:	This field will display the number of repair orders created for the selected departments. **Note:** The departments listed in this field are service departments and they will display as per setup in the **Preference** screen.
Clear Department Filter	Tick this option to remove the departments from appearing and display all repair orders created for that deal.

Deals that have repair orders attached need to have the start and end dates entered in order for the *Estimated Delivery Date* in the *Pre-Delivery Status* screen to automatically calculate. Select the **Jobs** button and the following screen will be displayed:

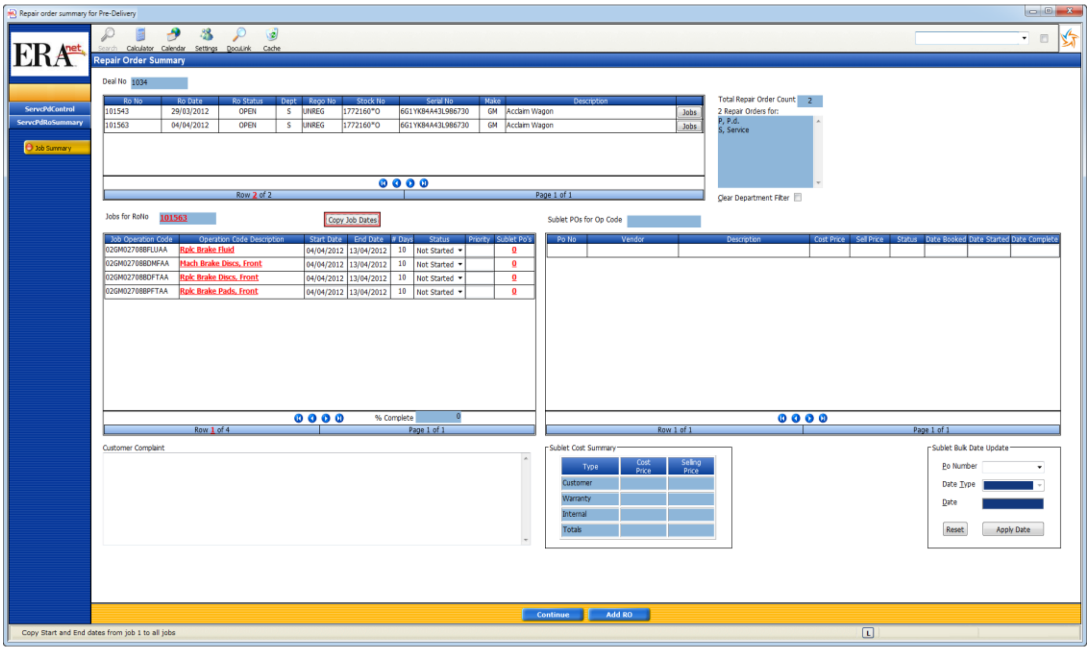
Note: Deals with single repair order will display the job details automatically.



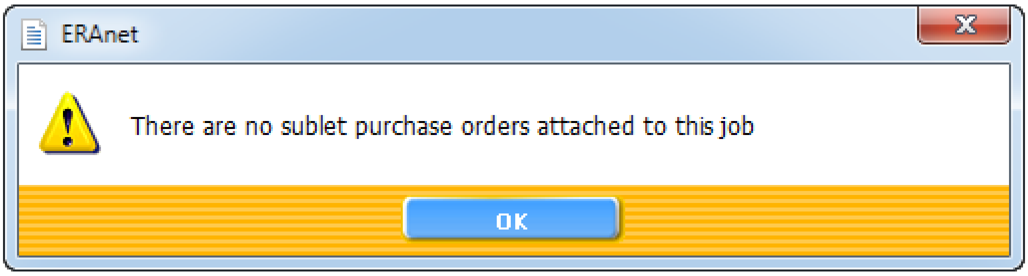
Jobs for RoNo	This field will display the **repair order number**. Selecting this option will take the user to the *RO Close Out* screen. The user is able to update the repair order.
Copy Job Dates	For repair orders with multiple jobs, the **Copy Dates** button can be used to apply the same dates against each job that do not have any sublet purchase orders attached.

Job Operation Code	This field will display the operation code.
Operation Code Description	This field will display the **operation code description**. Selecting this hyperlink will display any customer complaints.
Start Date	Enter the ***start date*** of when that job is scheduled to begin work. **Note:** The *start date* for jobs with sublets attached will be controlled by the sublet date started field. Upon entering a sublet start date, this field will become disabled.
End Date	Enter the ***end date*** of when that job is scheduled to finish. **Note:** The *end date* for jobs with sublets attached will be controlled by the sublet date completed field. Upon entering a sublet complete date, this field will become disabled.
# Days	This field will automatically display the number of days it will take to complete that job.
Status	Select a valid ***status*** from the dropdown box. Valid options include, Not Started, Started and Complete. **Note:** This field will be disabled for any jobs with sublets attached to it. The sublet purchase order dates will control this status.
Priority	The user is able to enter the ***priority*** of the work to be completed.
Sublet Po's	This field will display the number of **sublet purchase orders** created against each job.

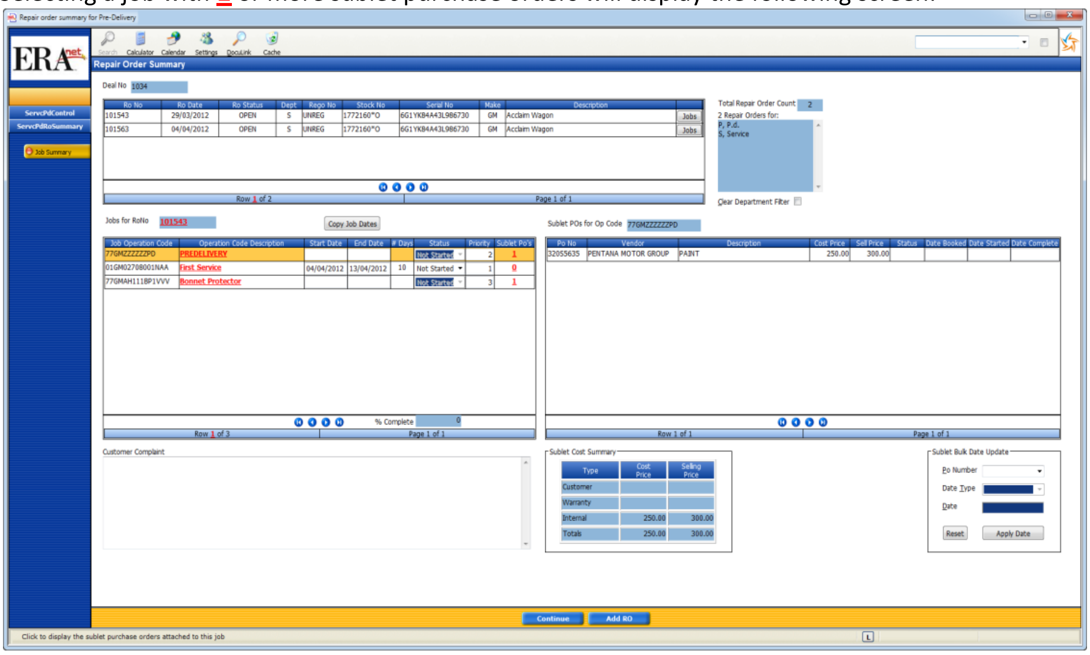
Selecting the **Copy Dates** button will copy the *start* and *end* date from the first job with dates to all other jobs that have no sublet attached to them as displayed in the following example:



Selecting a job with **0** sublet purchase orders will display the following pop up message:



Selecting a job with **1** or more sublet purchase orders will display the following screen:



Sublet POs Op Code	This field will display the selected operation code.
Po No	This field will display the sublet purchase order number.
Vendor	This field will display the name of the vendor performing the sublet repair.
Description	This field will display the description of the sublet repair.
Cost Price	This field will display the estimated cost price of the sublet repair.
Sell Price	This field will display the estimated sell price of the sublet repair.
Status	This is the status of the sublet purchase order. **Note:** A sublet status can be Blank, Invoice or Closed.
Date Booked	Enter the ***date*** the sublet has been booked with the repairer.
Date Started	Enter the ***date*** the sublet work has started at the repairer. **Note:** The job's start date will automatically be updated based on the sublet start date.
Date Complete	Enter the ***date*** the sublet work has been completed by the repairer. **Note:** The job's end date will automatically be updated based on the sublet complete date.

Sublet Cost Summary

Type	This column will display the sublet sale type.
Cost Price	This column will display the cost price of the sublet for that job.
Selling Price	This column will display the selling price of the sublet for that job.

Sublet Bulk Date Update

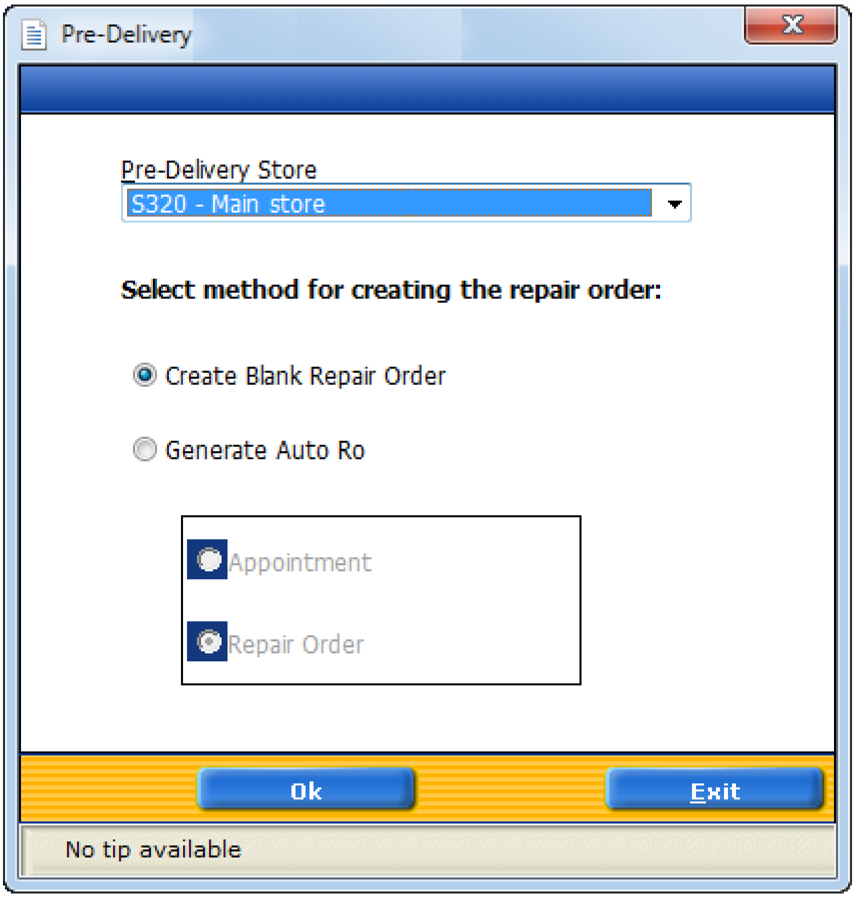
Sublets with multiple items can have their dates entered in bulk.

Po Number	Select the required ***purchase order number*** from the dropdown box to update.
Date Type	Select the ***date type*** from the dropdown box. Valid options include Date Booked, Date Started and Date Complete.
Date	Enter the ***date*** to apply to all lines as per *date type* selection.
Reset	Select the **Reset** button to clear the fields.
Apply Date	Select the **Apply Date** button to apply the date to all lines.

Continue	Select the **Continue** option from the action bar to return to the *Pre-Delivery Control* screen.
Add RO	Select the **Add RO** option from the action bar to create another repair order against the deal. **Note:** The **Add RO** functionality is the same as the **Add** functionality from the *Pre-Delivery Control* screen.

Add button

From the *Pre-Delivery Control* screen, the user is able to create a repair order by selecting the Add button and the following screen will be displayed:



Pre-Delivery Store will default to the Pre-Delivery Store as determined by the Sales Department set up in ***4524 – Sales Department Codes***. A different store can be selected from the drop down box.

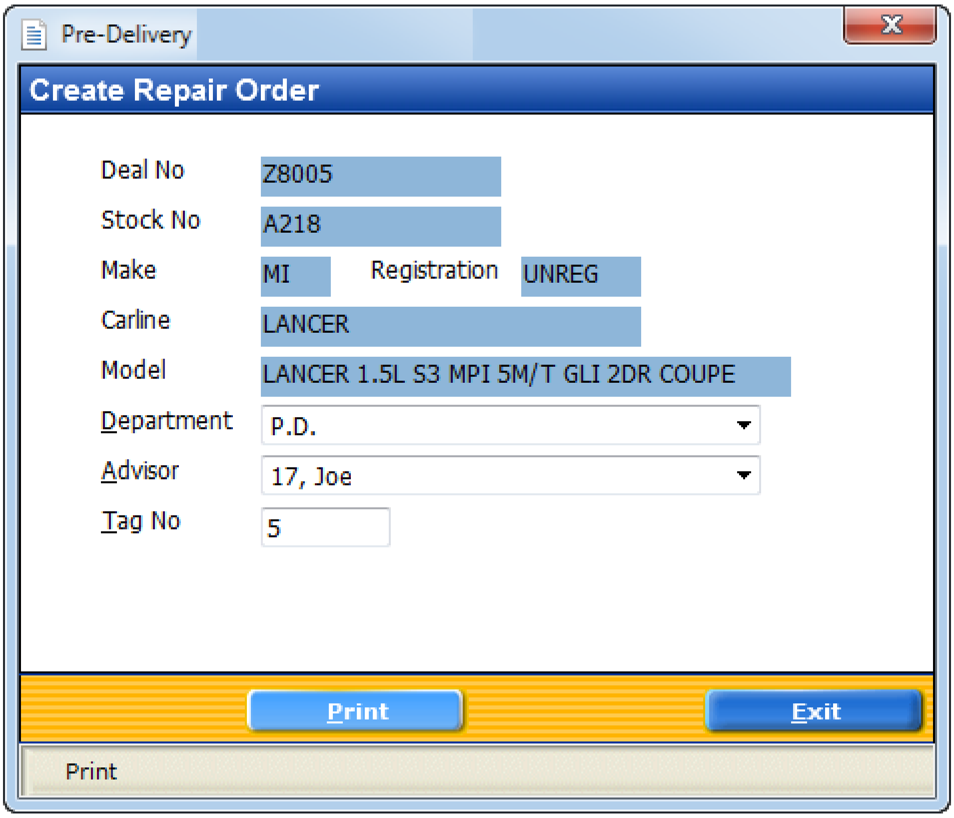
Select the ***Create Blank Repair Order*** option for deals that do not have a Factory Order Number or a Stock Number allocated or select ***Generate Auto Ro*** to create an appointment, quote or repair order as per existing *Service Appointments* functionality.

Select Ok to proceed with creating the repair order or Exit to return to the *Pre-Delivery Control* screen.

Note: The *Generate Auto Ro* option will be disabled if the deal number does not have Fact Ord # or a Stock No entered.

Create Blank Repair Order

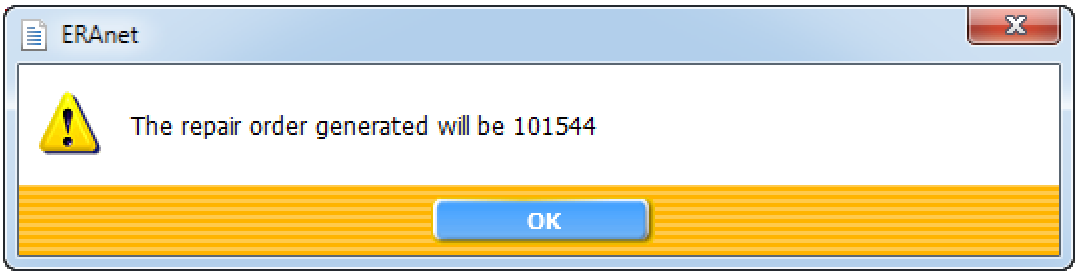
Selecting the *Create Blank Repair Order* option will display the following screen:



Deal No	This field will display the deal number as displayed in the *Pre-Delivery Control* screen.
Stock No	This field will display the stock number as displayed in the *Pre-Delivery Control* screen.
Make	This field will display the make as displayed in the *Pre-Delivery Control* screen.
Registration	This field will display the vehicle registration number as displayed in the *Pre-Delivery Control* screen.
Carline	This field will display the vehicle carline as displayed in the *Pre-Delivery Control* screen.
Model	This field will display the vehicle model as displayed in the *Pre-Delivery Control* screen.
Department	Select a service ***department*** from the dropdown box.
Advisor	Select a service ***advisor*** from the dropdown box.
Tag No	Enter the required ***tag number***.

Select **Print** to generate a blank repair order or **Exit** to return to the *Pre-Delivery Control* screen.

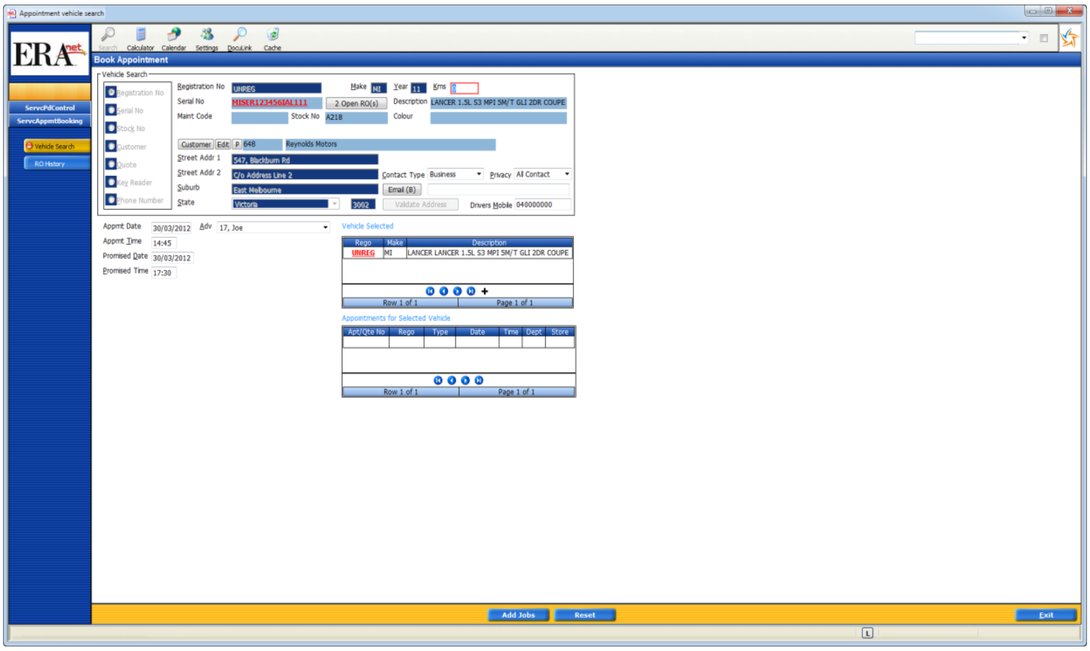
The following pop up message will display when the user selects the **Print** option:



Select **Ok** to print the blank repair order.

Generate Auto Ro

Selecting the ***Generate Auto Ro*** option will enable the Appointment, Quote and Repair Order options. Selecting an ***option*** followed by **Ok** will display the following screen:

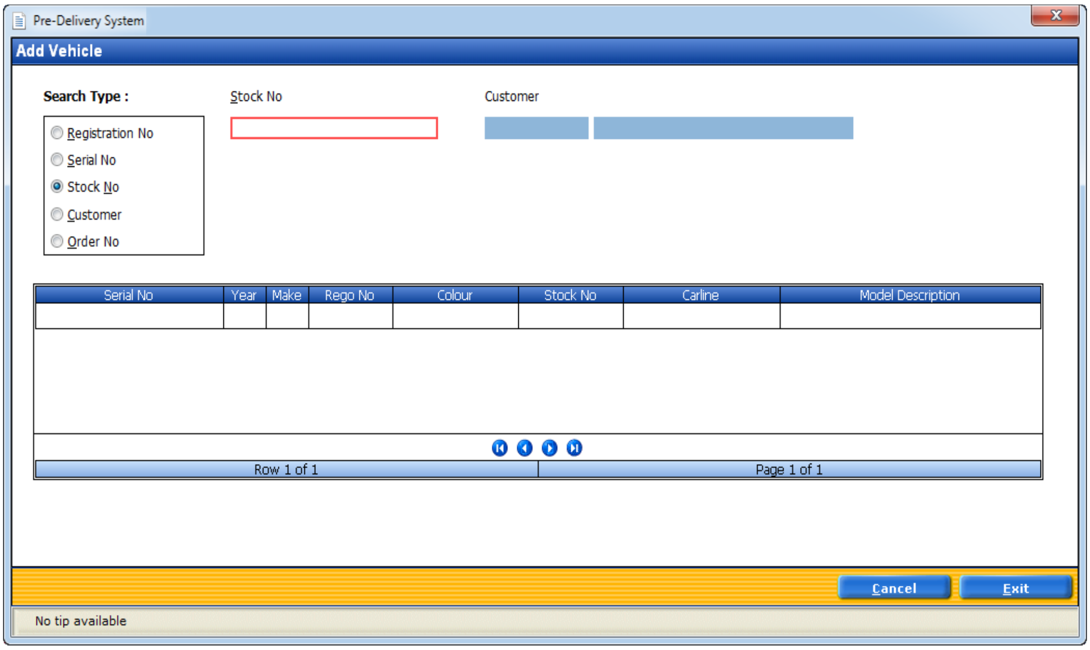


Proceed towards creating the repair order as per existing *Service Appointments* functionality.

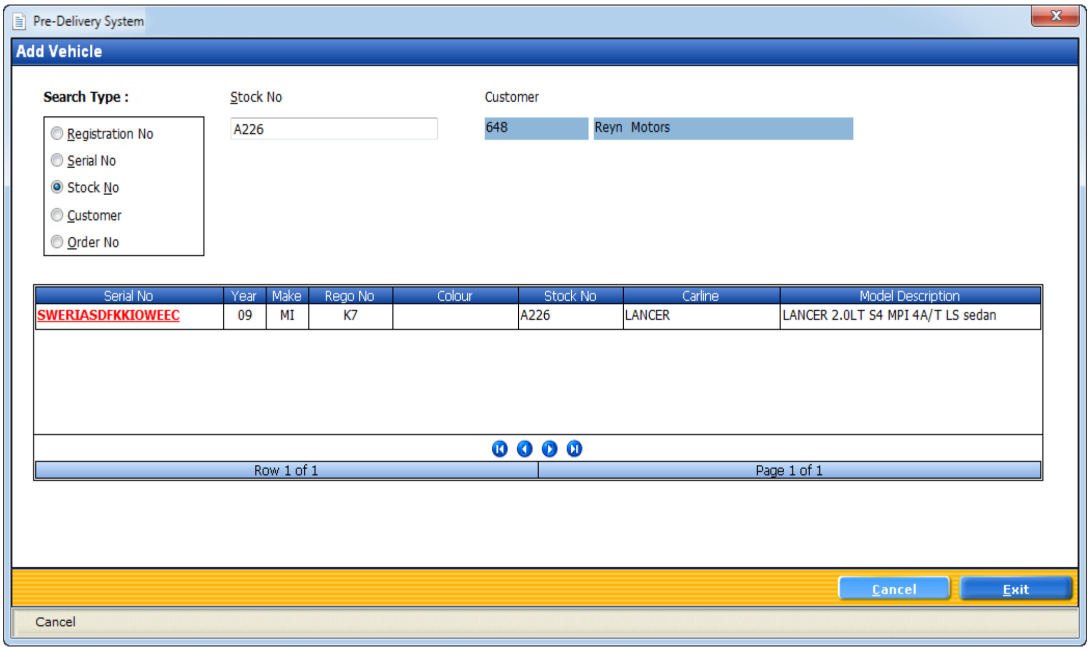
Add Vehicle

The user is able to add vehicles that have come back to the dealership for pre-delivery service. These are vehicles that are currently not attached to a deal.

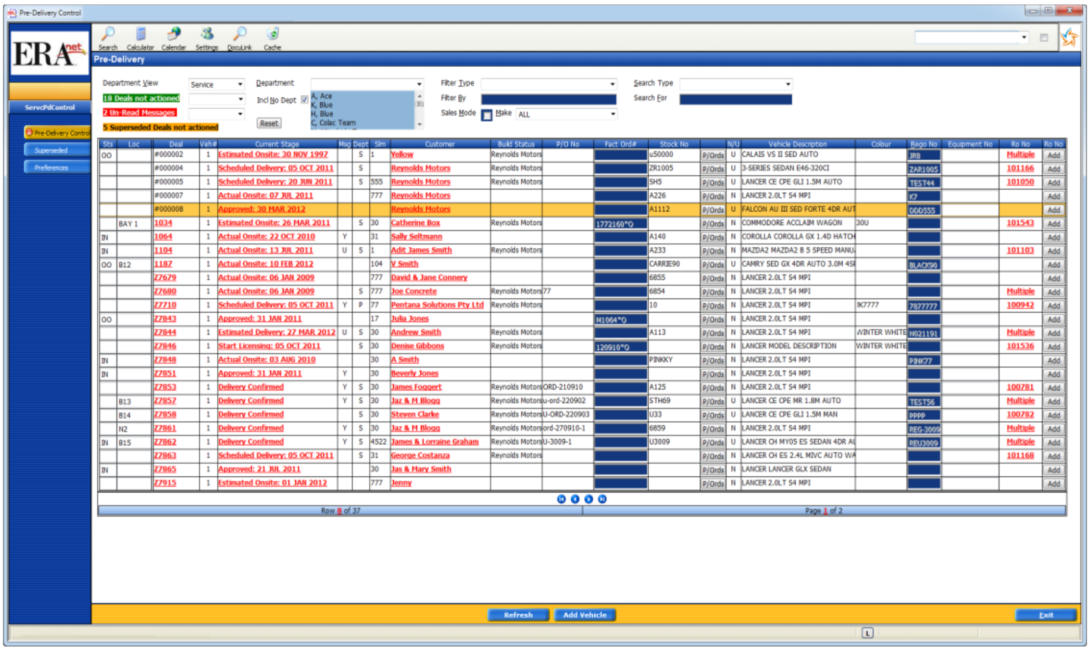
Select the **Add Vehicle** option from the action bar and the following screen will be displayed:



Search for a vehicle from any of the ***Search Type*** and the following screen will be displayed:



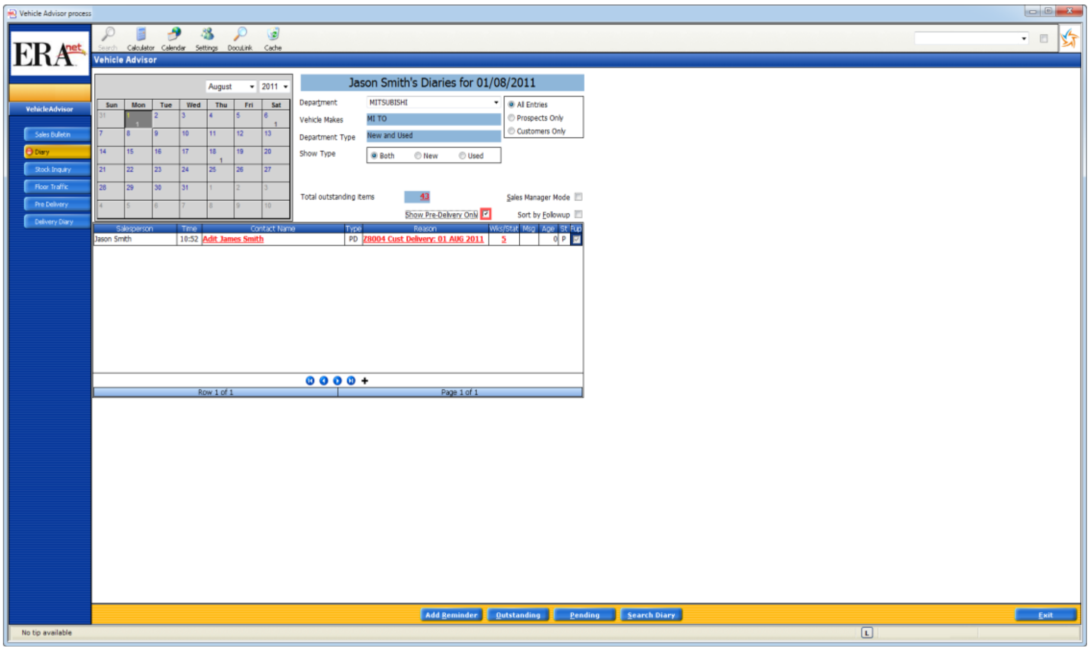
To add the vehicle to the Pre-Delivery system, select the **Serial No** hyperlink and the following screen will be displayed:



Note: The deal number has # in front of it to indicate that the vehicle has been added from the *Pre-Delivery Control* screen.

The user is now able to carry on the pre-delivery work as per functionality mentioned in this user documentation.

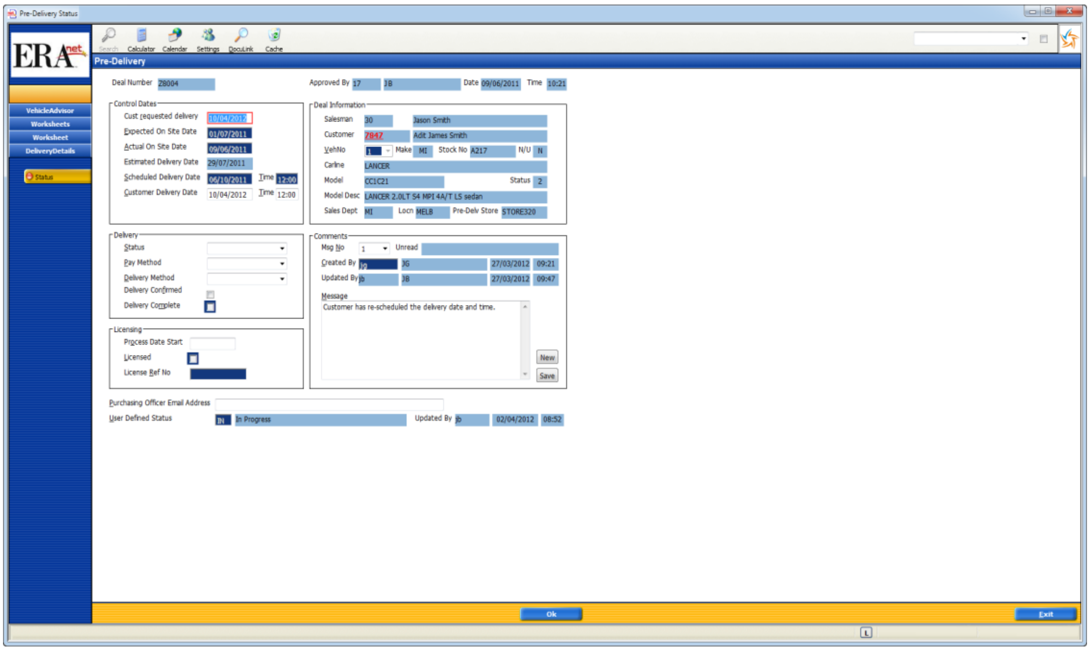
Any dates that are entered in the *Pre-Delivery* screens will automatically be updated in the salesperson's diary though *Vehicle Advisor* as per following example:



Note: A new type *PD* has been created to indicate messages that have come from the *Pre-Delivery* screen. The Reason field will display the current stage of the vehicle. This information is valuable to the salesperson as it will enable them to schedule the delivery of the vehicle to the customer.

The user is able to filter through and show Pre-Delivery items only by ticking the ***Show Pre-Delivery Only*** check box.

The salesperson is able to schedule the ***Customer Delivery Date*** and ***Time*** by selecting the Wks/Stat hyperlink, Model Description hyperlink, followed by the Delivery Details option from the nav bar within *Vehicle Advisor* as displayed in the following example:

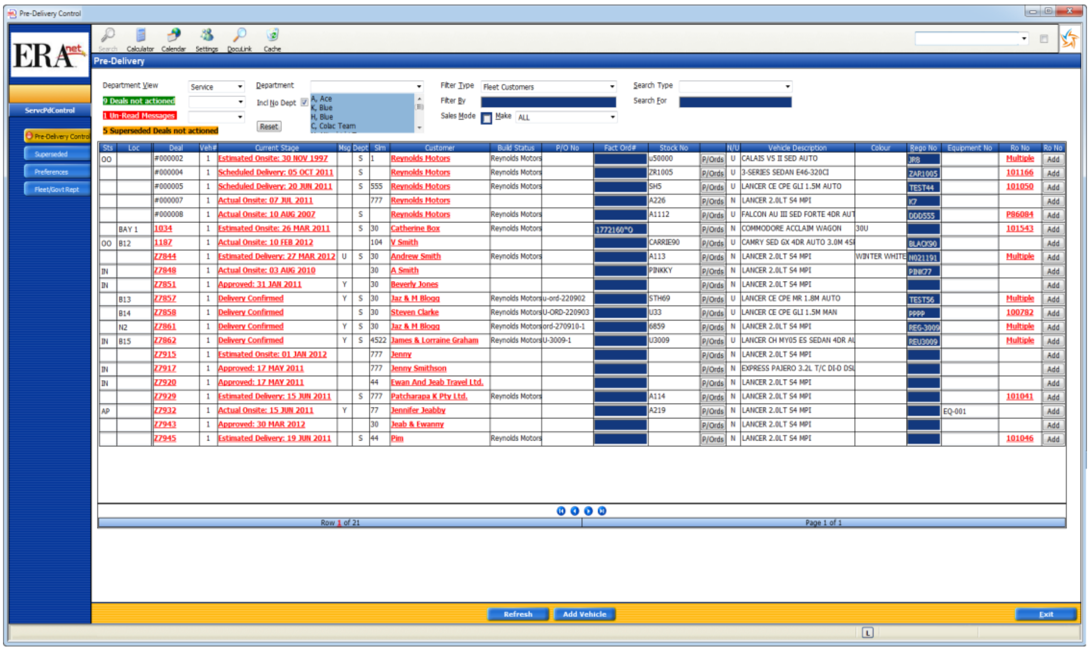


Select **Ok** from the action bar to save the changes and return to the *Vehicle Worksheets* screen as per existing functionality.

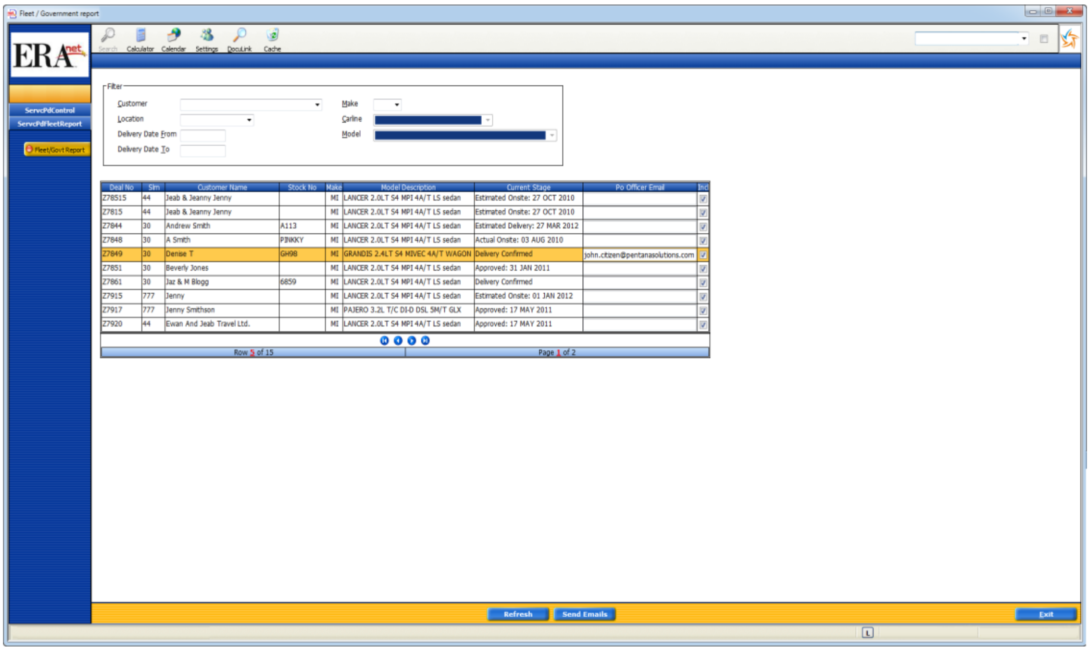
Fleet/Govt Report

The user is able to generate a report for Fleet Customers to notify them on the status of their vehicle orders.

From the *Pre-Delivery Control* screen, select Filter Type as ***Fleet Customers*** from the dropdown box and a list of all Fleet, Rental and Government type Customers will display as shown in the following example:



Select **Fleet/Govt Report** option from the nav bar and the following screen will be displayed:



Filter

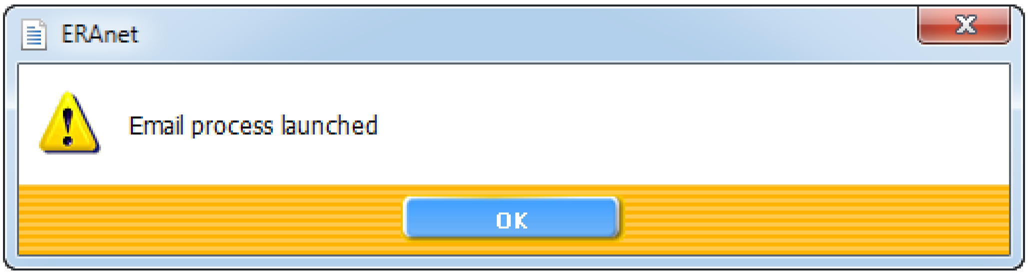
Customer	The user is able to filter by selecting a specific ***customer*** from the dropdown box.

Location	The user is able to filter by selecting a specific ***location*** from the dropdown box.
Delivery Date From	The user is able to filter by entering a ***scheduled delivery from*** date.
Delivery Date To	The user is able to filter by entering a ***scheduled delivery to*** date.
Make	The user is able to filter by selecting a specific ***make*** from the dropdown box.
Carline	The user is able to filter by selecting a specific ***carline*** from the dropdown box. **Note:** This field will be disabled until the *Make* field has been selected.
Model	The user is able to filter by selecting a specific vehicle ***model*** from the dropdown box. **Note:** This field will be disabled until the *Carline* field has been selected.

Deal No	This field will display the deal number as displayed in the *Pre-Delivery Control* screen.
Slm	This field will display the salesperson number as displayed in the *Pre-Delivery Control* screen.
Customer Name	This field will display the fleet customer name as displayed in the *Pre-Delivery Control* screen.
Stock No	This field will display the vehicle stock number as displayed in the *Pre-Delivery Control* screen.
Make	This field will display the vehicle make as displayed in the *Pre-Delivery Control* screen.
Model Description	This field will display the vehicle model description as displayed in the *Pre-Delivery Control* screen.
Current Stage	This field will display the current stage the deal is at as displayed in the *Pre-Delivery Control* screen.
Po Officer Email	This field will display the Purchase Officer Email address from the *Pre-Delivery Status* screen. The user is able to enter a different ***email address*** in this field. The report will be sent to the email recipient entered in this field. **Note:** This is not a mandatory field.
Incl	Tick this option to send the report for that specific deal to the email address entered in the PO Officer Email field. **Note:** All deals will be ticked by default and the user will need to check this field prior to emailing the report. Any deals that have been selected will need to have an email address entered, otherwise an error message will display telling the user which row is missing an email address.

The user is able to select the **Refresh** option from the action bar to remove the existing information and start a new search, or select the **Exit** option from the action bar to return to the *Pre-Delivery Control* screen without sending the report.

Once the relevant deals have been selected, the user will need to select the **Send Emails** option from the action bar to send the report to the required Purchasing Officers and the following pop up will be displayed:



Select the **Ok** option to return to the *Fleet/Govt Report* screen.

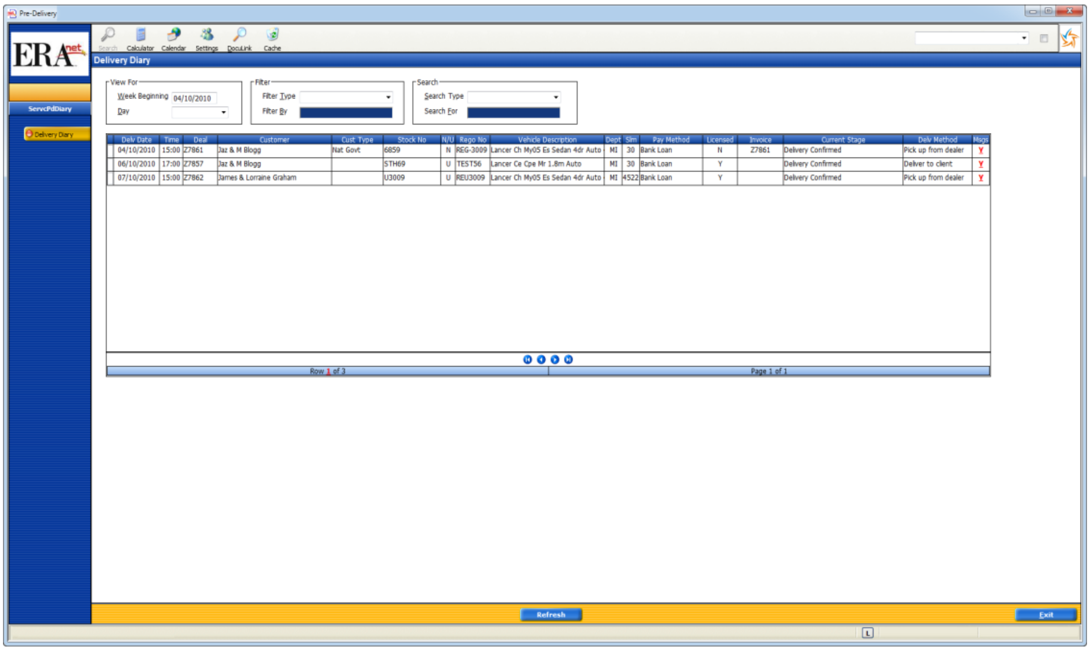
Following is an example of the emailed report:

```
01 AUG                                          Delivery Advice for Denise T                                                    Enet
11:37                                                                                                                         Page 1

Order Date     Purchase Order # Est Delivery   Sched Delivery Stock Number Vehicle Type
-------------- ---------------- -------------- -------------- ------------ -----------------------------------
15 SEP 2010                     21 SEP 2010    21 SEP 2010    GH98         GRANDIS 2.4LT S4 MIVEC 4A/T WAGON
```

Users are able to view an onscreen report which displays the deliveries that have been scheduled for the week.

Select ***Showroom***, followed by ***Delivery Diary*** and the following screen will be displayed:



Note: The above screen will display a list of the deliveries for the week beginning date that is entered. The list will appear in date and time order.

View For

Week Beginning	Enter the ***date*** for the week to view the delivery details for. **Note:** The week beginning date will always be the Monday date for

	that week. Entering a date in the middle of the week will automatically change it to the Monday's date.
Day	Select a ***day*** from the dropdown list to view a specific day's deliveries.

Filter

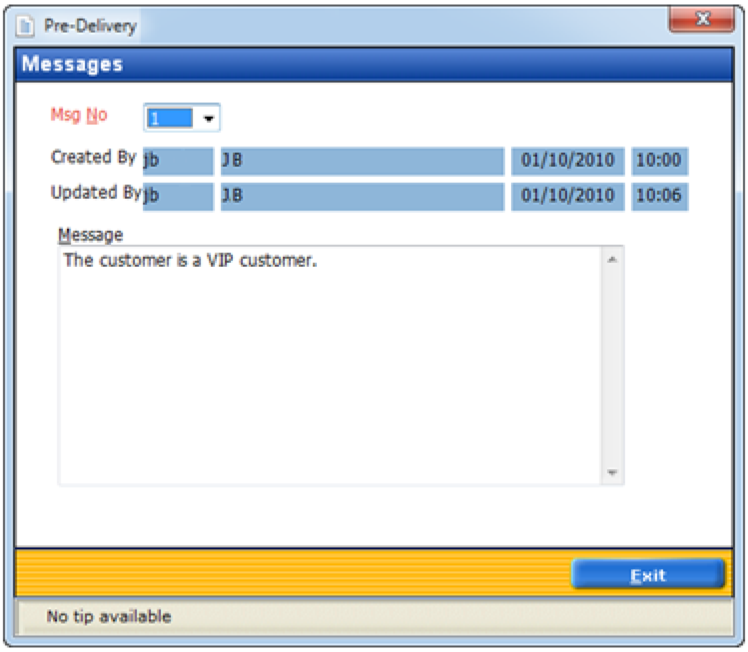
Filter Type	Select a valid ***Filter Type*** option from the dropdown list. **Note:** The options available to select from are *Salesman, Customer, New Vehicles, Used Vehicles and Fleet Customers* which includes *Government* and *Rental*.
Filter By	Enter the filter by ***criteria*** based upon the Filter Type selected. **Note:** This field will be disabled until a Filter Type has been selected.

Search

Search Type	Select a valid ***Search Type*** option from the dropdown list. **Note:** The options available to select from are *Deal*, *Stock No*, *Rego No*.
Search For	Enter the search for ***criteria***. The first line that matches the criteria will be highlighted. **Note:** This field will be disabled until a *Search Type* has been selected.

Delv Date	This field displays the *customer delivery date* as entered by the salesperson in the *Pre-Delivery Status* screen.
Time	This field displays the *customer delivery time* as entered by the salesperson in the *Pre-Delivery Status* screen.
Deal	This field displays the *deal number*.
Customer	This field displays the *name* of the customer.
Cust Type	This field displays the *sale type* for the deal.
Stock No	This field displays the *stock number* attached to the deal.
N/U	This field displays the *N* for *New Vehicle* or *U* for *Used Vehicle* to be delivered.
Rego No	This field displays the *vehicle registration number*.
Vehicle Description	This field displays the *description* of the vehicle to be delivered.
Dept	This field displays the *department* the deal was created for.
Slm	This field displays the *salesperson number*.
Pay Method	This field displays the *pay method* as entered by the Salesperson or the Finance Manager.
Licensed	This field displays *Y* for Yes to indicate that *licensing* has been completed for this delivery or *N* for No to indicate that licensing is yet to be completed.
Invoice	This field displays the *invoice number* that has been generated for this deal. The invoice number will be generated when the vehicle has been sold through *Vehicle Sales Process*.
Current Stage	This field displays the current *status* of the delivery as per *Pre-Delivery Control* screen.
Delv Method	This field displays how the vehicle is to be *delivered* as entered by the salesperson.
Msgs	This field displays any *messages* that exist for this deal. **Y** for read messages or **U** for unread messages will be displayed.

Selecting a message with **Y** or **U** will display the following screen:
Note: This screen is display only.



Msg No	Select a ***message*** to read from the dropdown list.
Created By	This field displays the *user id* and *name* of the user who *created* the message as well as the date and time.
Updated By	This field displays the *user id* and *name* of the user that *modified* that message as well as the date and time.
Message	The *message* will be displayed in this field.

Select **Exit** from the action bar to return to the *Delivery Diary* screen.

Benefits

Dealerships are now able to track the flow of vehicles from purchase through to the delivery of the vehicle. As well as generate a report for Fleet Customers to notify them on the status of their vehicle orders. The Delivery Diary screen will offer the dealership a simple screen to review what deliveries are scheduled for a specific date.

Activation Key

ERANET-PREDEL

ERAnet – QLD –Registration Statutory Changes effective July 1 2012

Enhancement

Overview

New fields have been added in ***4451 – Registration Charges Maint*** to allow different rates for “Full rate” “Private” and “Other” Registration Fees.

Changes have been made to the CTP setups in ***4451 – Registration Charges Maint*** to include 3 NEW categories. Light Commercial (LCOM) vehicles, Minibuses (MBUS) and Motorcycles (MCYC).
CTP screens are now updated to match the Queensland government website which has actually reduced the number of registration categories from 7 to 5.

ERAnet Vehicle Advisor changes for QLD On-Roads will allow for the selection of these NEW categories.
The "Registration Class" field has 3 NEW options for "Light Comm (4t- 4.5t)", "Minibus (4t-4.5t)" and "Motorcycle".
The "Concession Class" field has 2 NEW options "Private" and "Other".
A NEW "Payment Term" radio group has been added to allow selection of 6 or 12 months figures for registration and CTP rates.
The "CTP Class" field has an updated list of categories to match the CTP setup screen.

Why

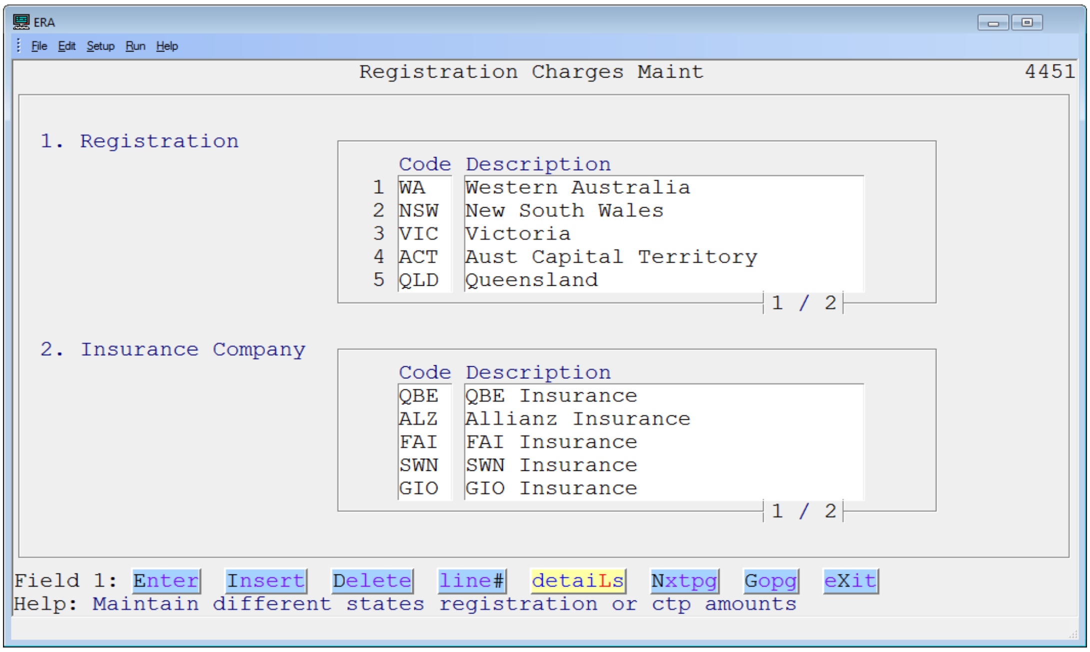
This change was completed due to Queensland Registration Statutory Changes effective July 1 2012.

Screens

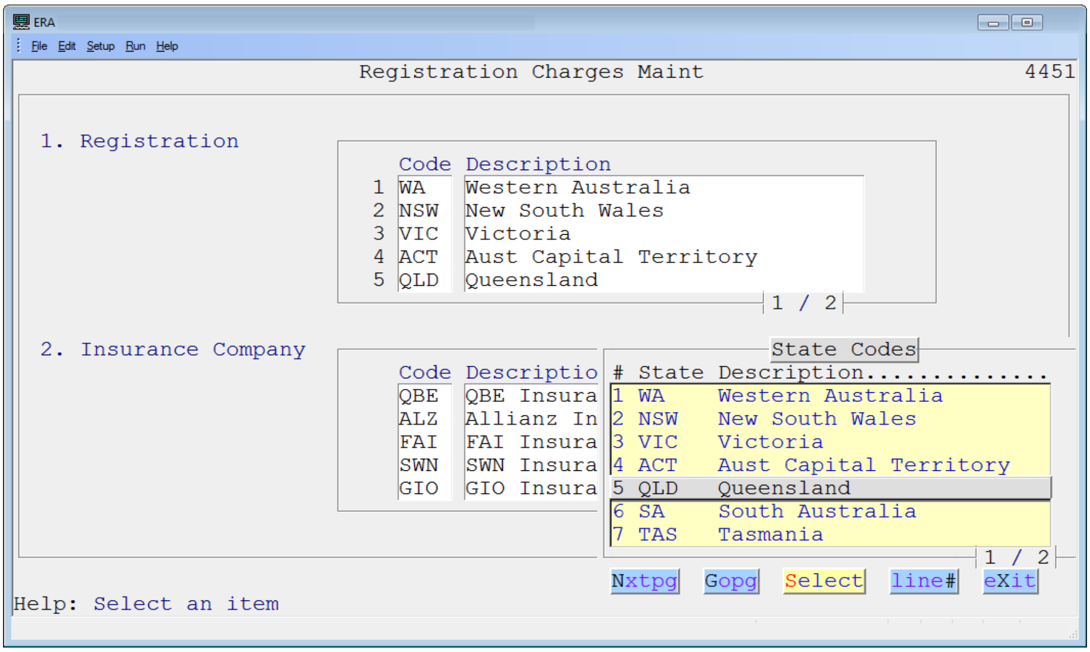
Showroom
Vehicle Advisor
4451 – Registration Charges Maint

The Setup

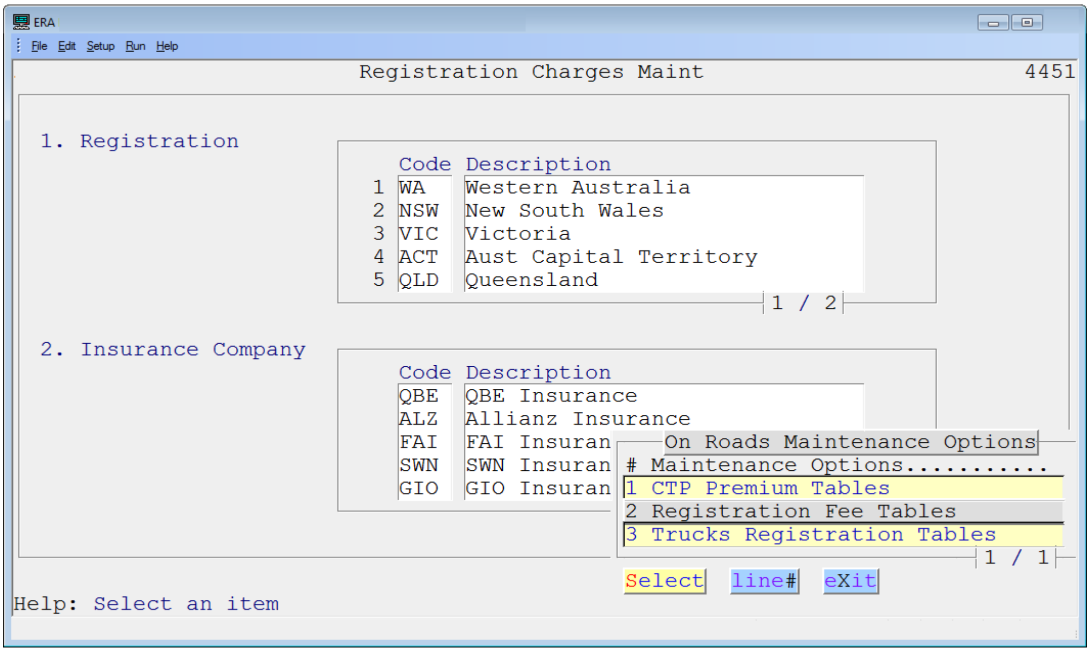
Enter ***4451 - Registration Charges Maint***, select line ***1 - Registration*** and the following screen will be displayed:



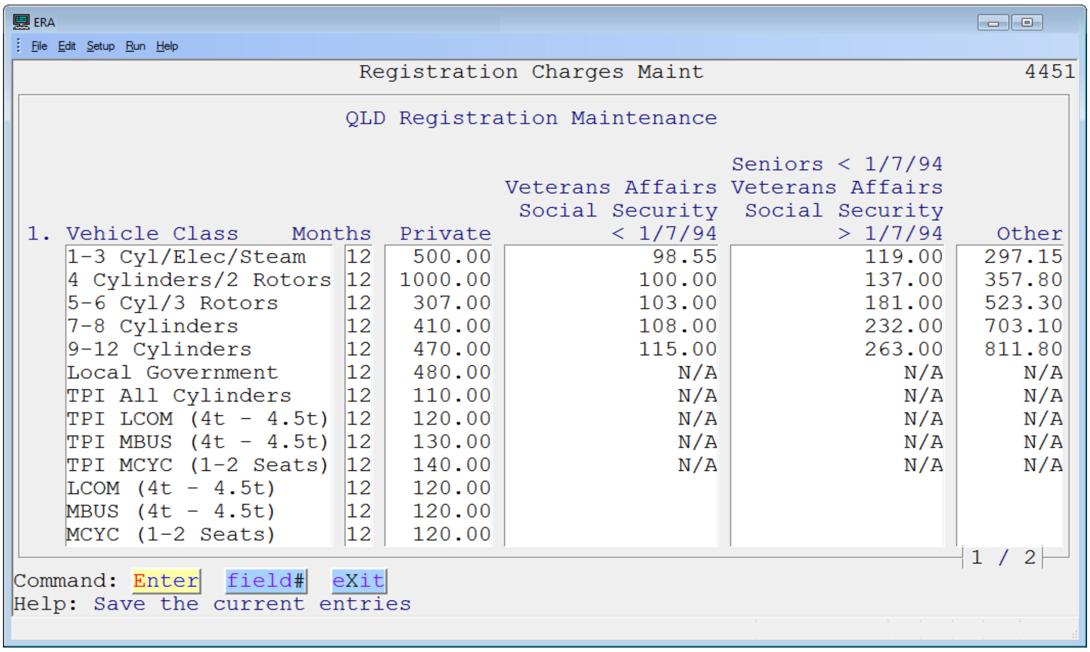
Select the ***detaiLs*** option from the command line and the following screen will be displayed:



Select ***QLD*** - ***Queensland*** from the lookup and the following screen will be displayed:



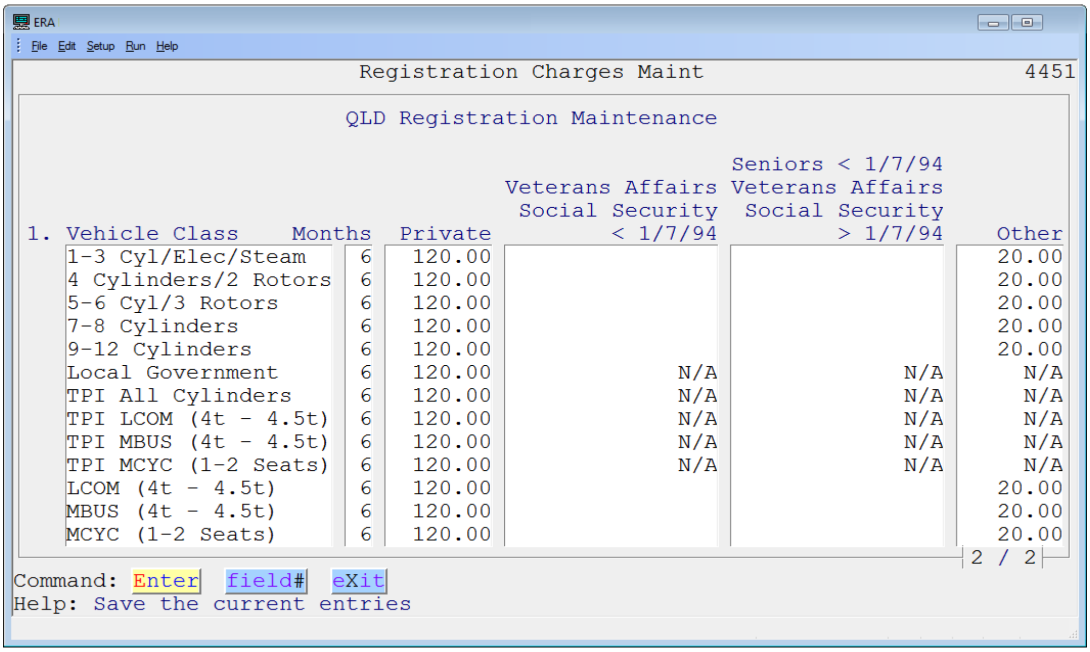
Select ***Registration Fee Tables*** from the lookup and the following screen will be displayed:



The *Vehicle Class* table displays the *categories* below updated effective July 1 2012:

LCOM (4t - 4.5t)
MBUS (4t - 4.5t)
MCYC (1-2 Seats)

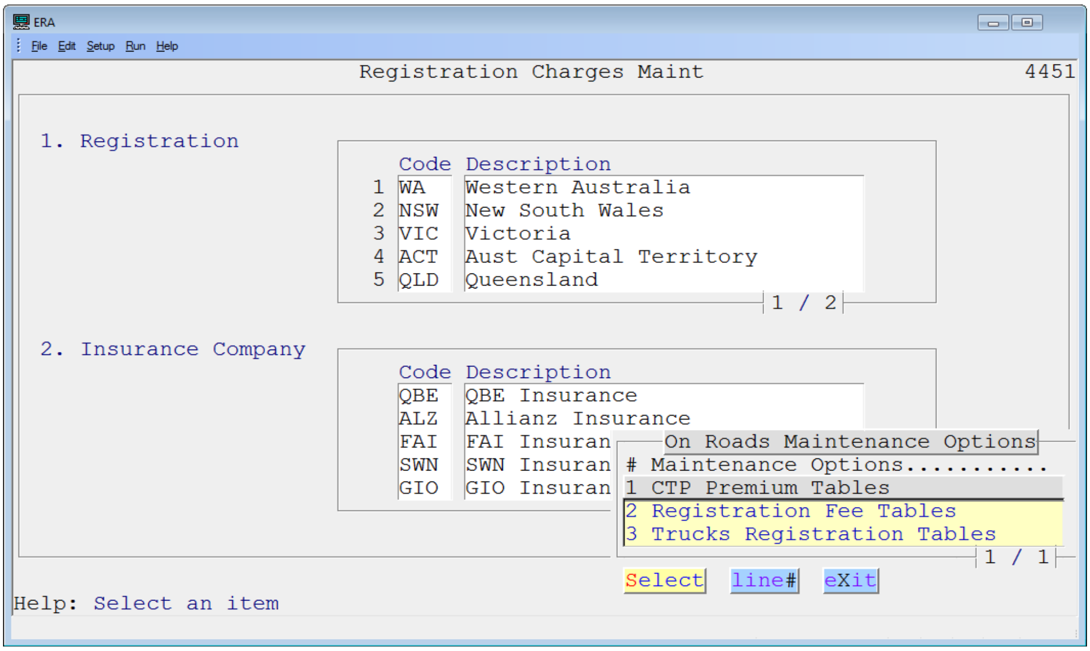
A new "Payment Term" column has been added to allow selection of both 6 and 12 months figures for registration and CTP rates.



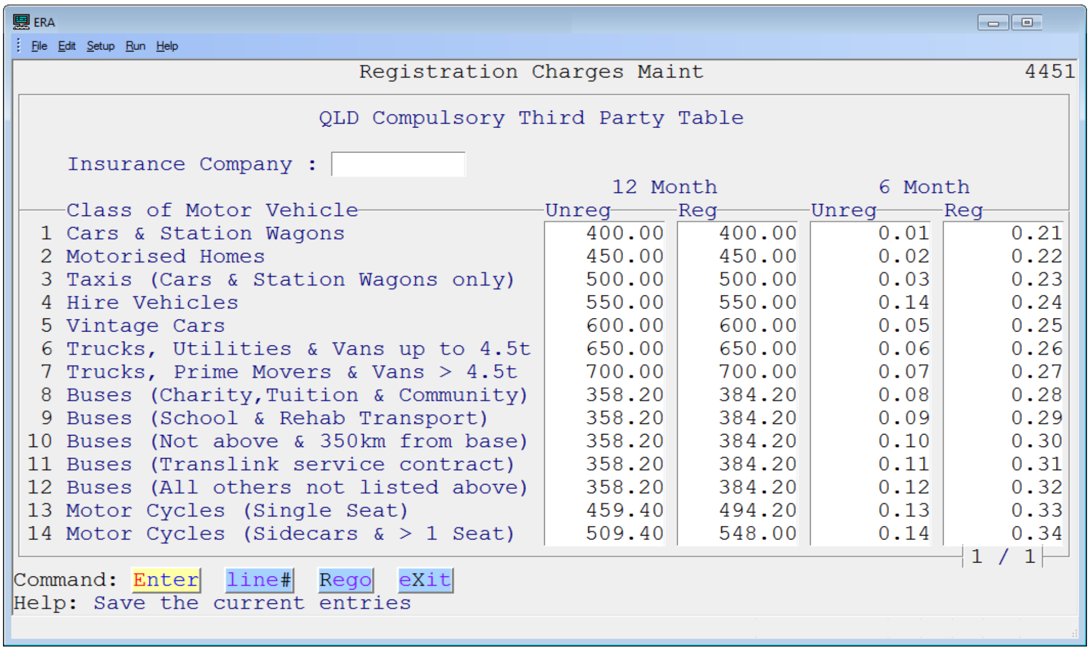
Note: The *Full Rate* column has been split into "Private" and "Other". If changes are required, ensure that the price entered is verified and entered according to pricing published by QLD Government Registration charges effective July 1 2012.

Select the ***Enter*** option from command line to save the changes and return to the main screen ***4451 - Registration Charges Maint***

Select ***QLD*** - ***Queensland*** from the lookup. Select ***CTP Tables*** from the lookup:



Select the Insurance Company required from the lookup and the following screen will be displayed:



ERA

File Edit Setup Run Help

Registration Charges Maint 4451

QLD Compulsory Third Party Table

Insurance Company :

	Class of Motor Vehicle	12 Month Unreg	12 Month Reg	6 Month Unreg	6 Month Reg
1	Cars & Station Wagons	400.00	400.00	0.01	0.21
2	Motorised Homes	450.00	450.00	0.02	0.22
3	Taxis (Cars & Station Wagons only)	500.00	500.00	0.03	0.23
4	Hire Vehicles	550.00	550.00	0.14	0.24
5	Vintage Cars	600.00	600.00	0.05	0.25
6	Trucks, Utilities & Vans up to 4.5t	650.00	650.00	0.06	0.26
7	Trucks, Prime Movers & Vans > 4.5t	700.00	700.00	0.07	0.27
8	Buses (Charity,Tuition & Community)	358.20	384.20	0.08	0.28
9	Buses (School & Rehab Transport)	358.20	384.20	0.09	0.29
10	Buses (Not above & 350km from base)	358.20	384.20	0.10	0.30
11	Buses (Translink service contract)	358.20	384.20	0.11	0.31
12	Buses (All others not listed above)	358.20	384.20	0.12	0.32
13	Motor Cycles (Single Seat)	459.40	494.20	0.13	0.33
14	Motor Cycles (Sidecars & > 1 Seat)	509.40	548.00	0.14	0.34

1 / 1

Command: Enter line# Rego eXit

Help: Save the current entries

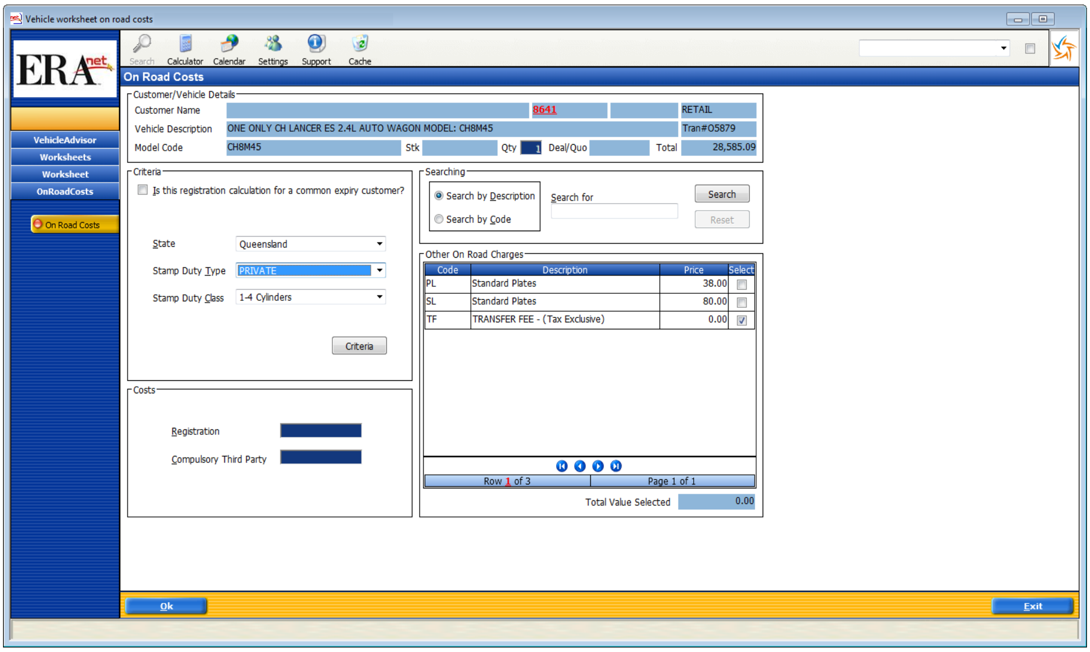
Note: QLD Compulsory Third Party (CTP) Table has 2 new columns for setting up registered and unregistered 6 month and 12 month payment period CTP amounts. If changes are required, ensure that the price entered is verified and entered according to pricing published by QLD CTP vehicle classes effective July 1 2012.

Once the setups have been entered, select the ***Enter*** option from the command line to save the changes.

The Process

On Road Costs

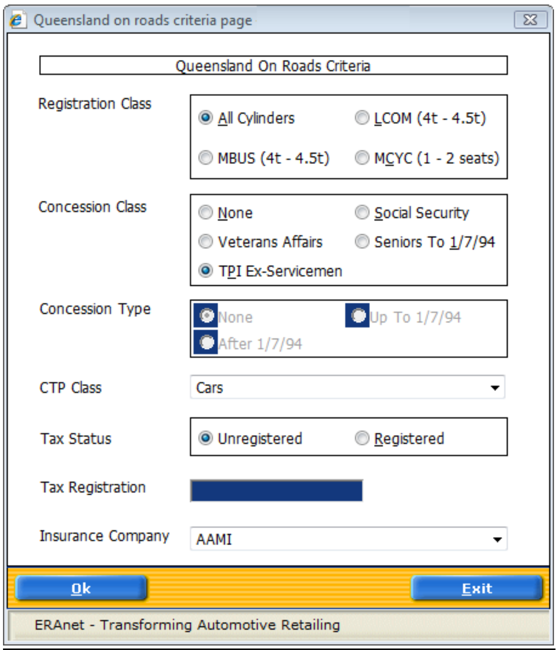
As per existing functionality, enter a ***vehicle worksheet*** via  ***Vehicle Advisor***. Select the **On Roads Costs** option from the navigation bar and the following screen will be displayed:



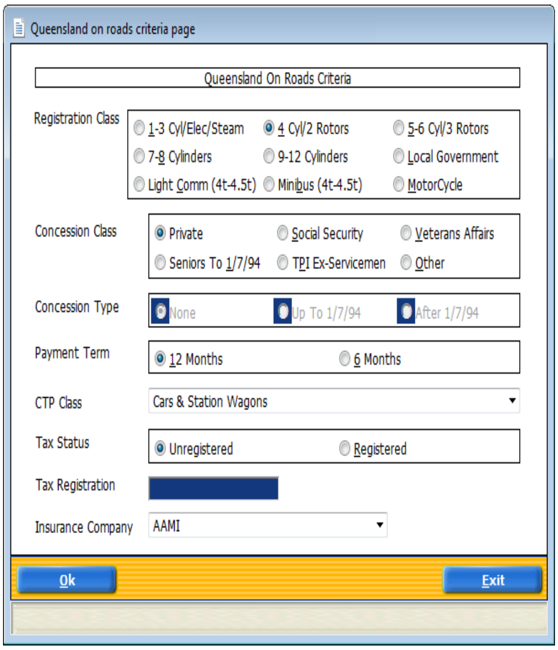
State	Select ***Queensland*** from the drop down list.
Stamp Duty Type	Select the ***Stamp Duty Type*** from the drop down list. Selecting this option will apply new stamp duty rates to the worksheet as per the setup in ***4442 - Stamp Duty Maintenance.***
Stamp Duty Class	Select the ***Stamp Duty Class*** from the drop down list.

Once completed, select the **Criteria** button and the following pop up screen will be displayed:

Before Change:



After Change:

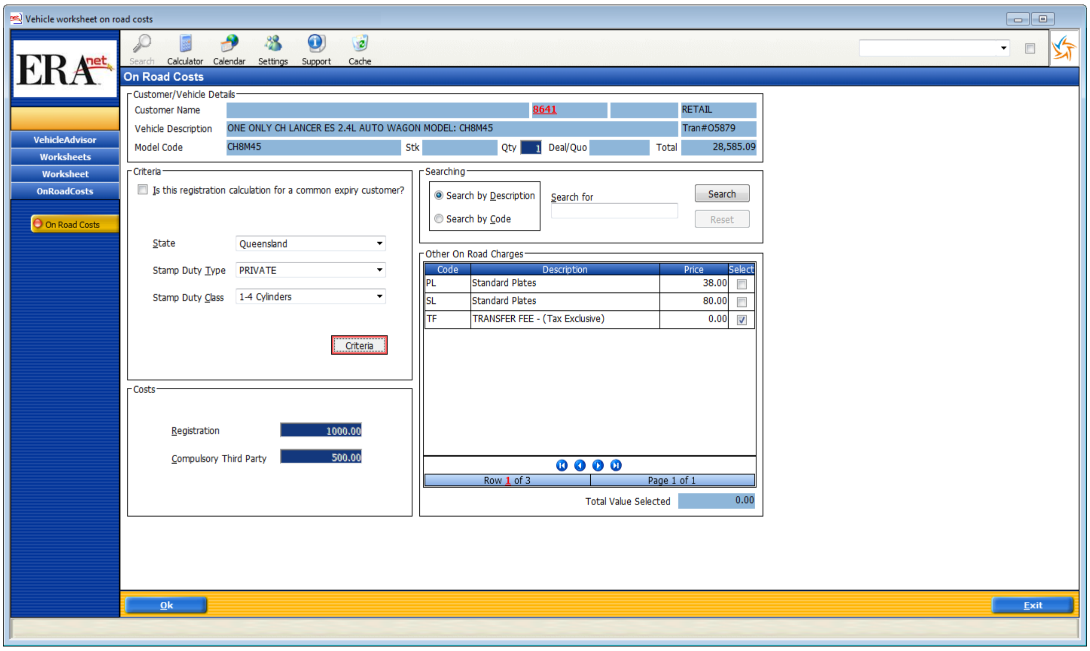


Note: The "Concession Class" field has had the "None" radio option replaced with "Private" and "Other".

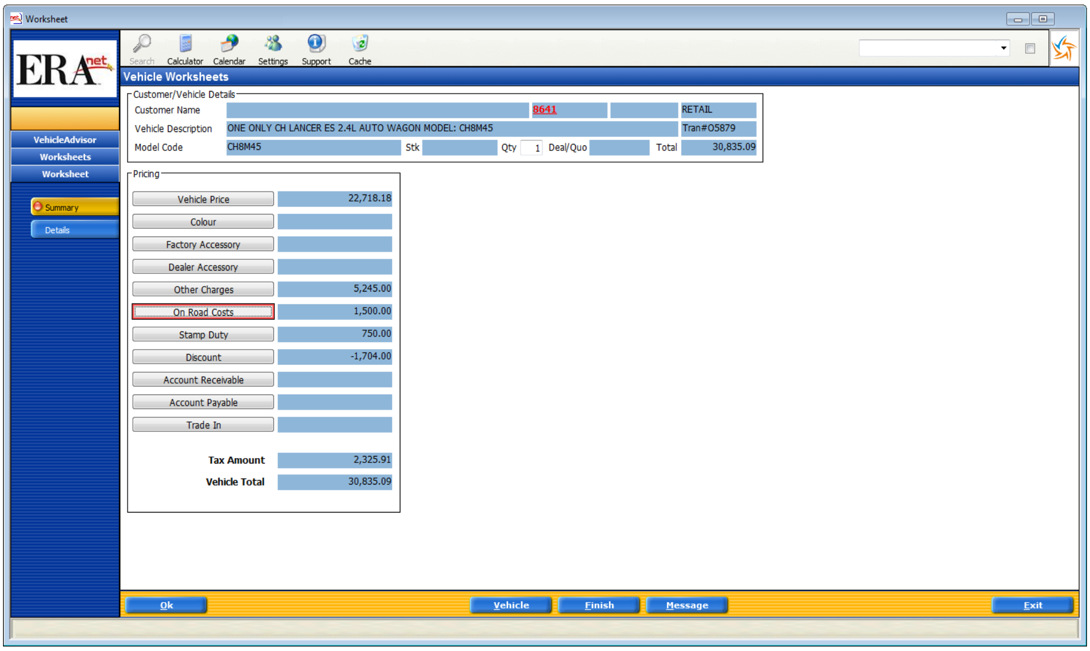
A new "Payment Term" radio group has been added to allow selection of both 6 and 12 months figures for registration and CTP rates.

The additional *Registration Classes* setup via **4451 - Registration Charges Maint** is now displayed in this screen.

Select ***Ok*** to get the registration fee for the vehicle and return to the **On Roads Costs** screen.



As per previous functionality, the **On Roads Costs** amount will automatically calculate and display in the ***Vehicle Worksheet***.



Benefits

The registration charges Queensland are now in line with the current legislation.

ERAnet – Victoria – Stamp duty

Enhancement

Overview

A new Stamp duty type, Demo commercial has been added in 4442 – Stamp Duty Maintenance to allow different stamp duty rates. This option will display in Stamp duty type drop down list in the worksheet on road costs screen.

Four new fields have been added in 4451 – Registration Charges Maint to allow normal and Pensioner registration fees for Hybrid/Electric vehicles and Motorcycles.

A new radio group now has been available in ERANET Victoria on roads Criteria page to select Normal, Hybrid/Electric or Motorcycle registration type.

Why

This change was made through a Request for Development submission to enhance existing functionality.

Screens

Showroom

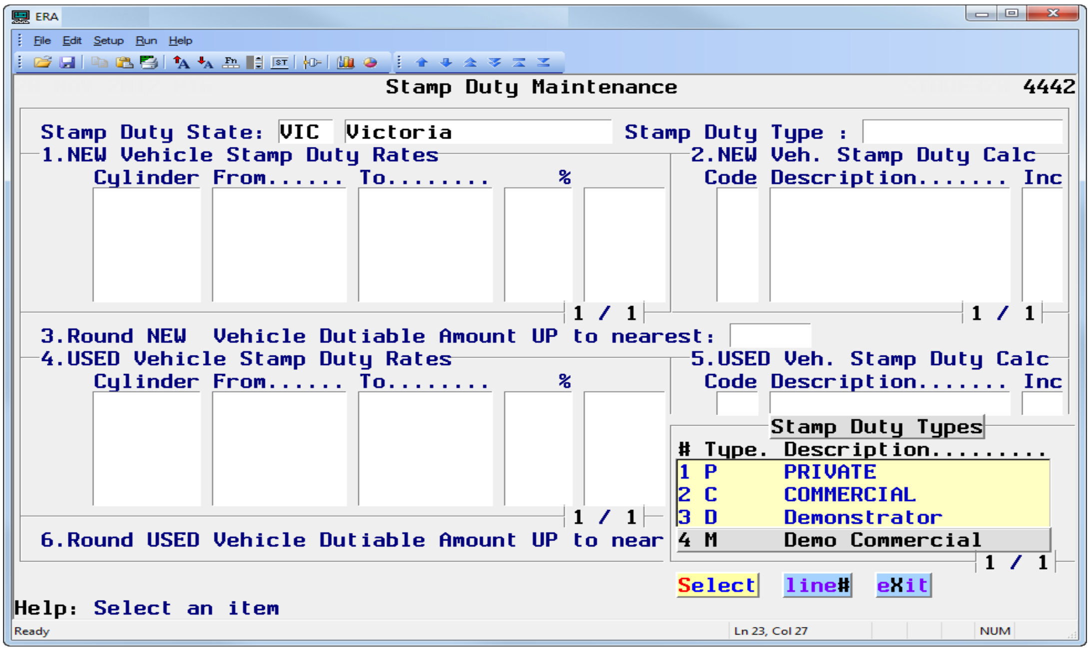
Vehicle Advisor

4442 - Stamp Duty Maintenance

4451 – Registration Charges Maint

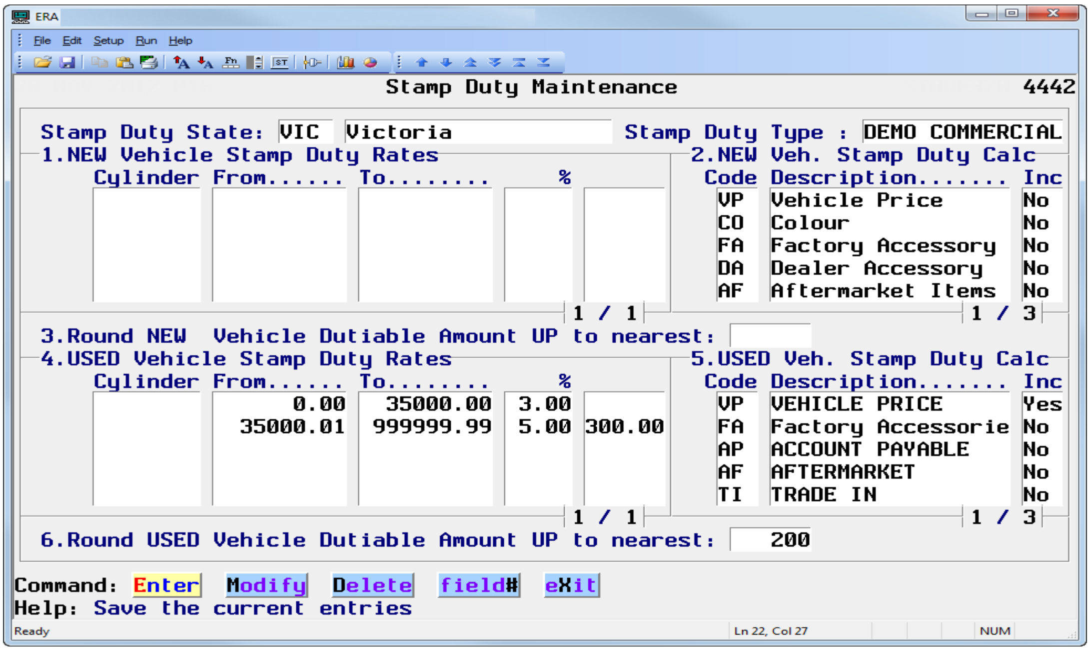
The Setup

Select 4442 - ***Stamp Duty Maintenance*** and the following screen will be displayed:



Stamp Duty State	Enter ***VIC*** for ***Victoria*** or select a state from the lookup**.**
Stamp Duty Type	Enter ***M*** for ***Demo Commercial*** or select a type from the look up.

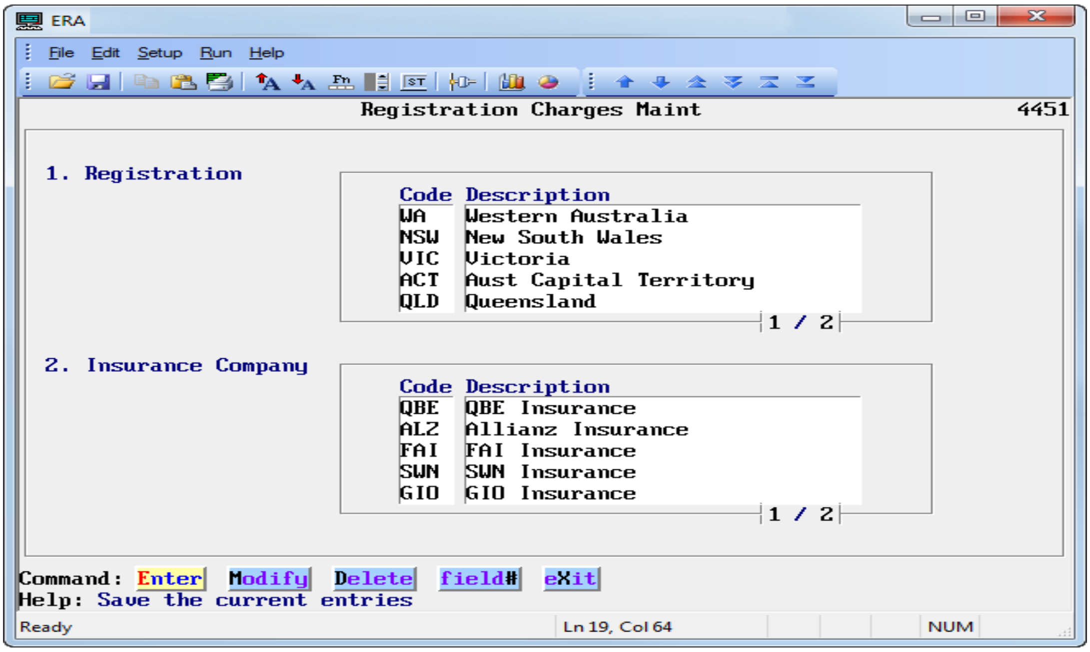
Once the state and type has been selected the following screen will be displayed:



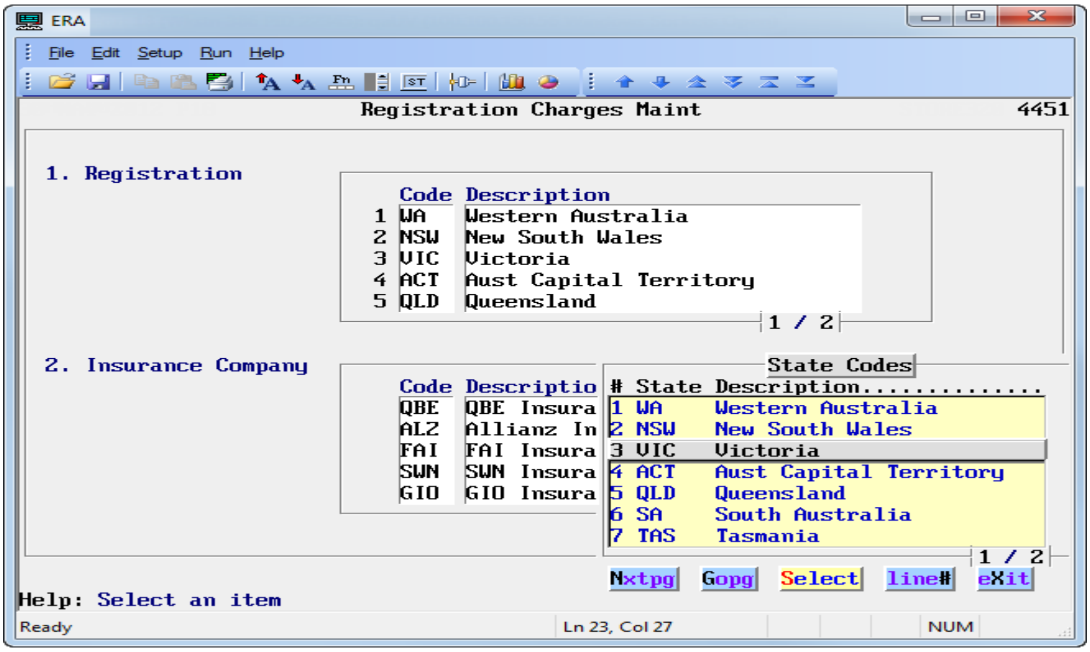
1. New Vehicle Stamp Duty Rates	This field is not applicable for Demo Commercial stamp duty type.
2. NEW Veh. Stamp Duty Calc	This field is not applicable for Demo Commercial stamp duty type.
3. Round NEW Vehicle Dutiable Amount UP to nearest	This field is not applicable for Demo Commercial stamp duty type.
4. USED Vehicle Stamp Duty Rates	Enter the ***stamp duty rates*** for vehicles.
5. USED Veh. Stamp Duty Calc	Flag the codes to be included in the stamp duty calculations by entering ***Y*** for Yes or ***N*** for No.
6. Round USED Vehicle Dutiable Amount UP to nearest	Enter the ***dollar amount*** to round up the Dutiable amount to the nearest. This figure is a whole amount without decimal points.

Once the setups have been entered, select the ***Enter*** option from the command line to save the changes.

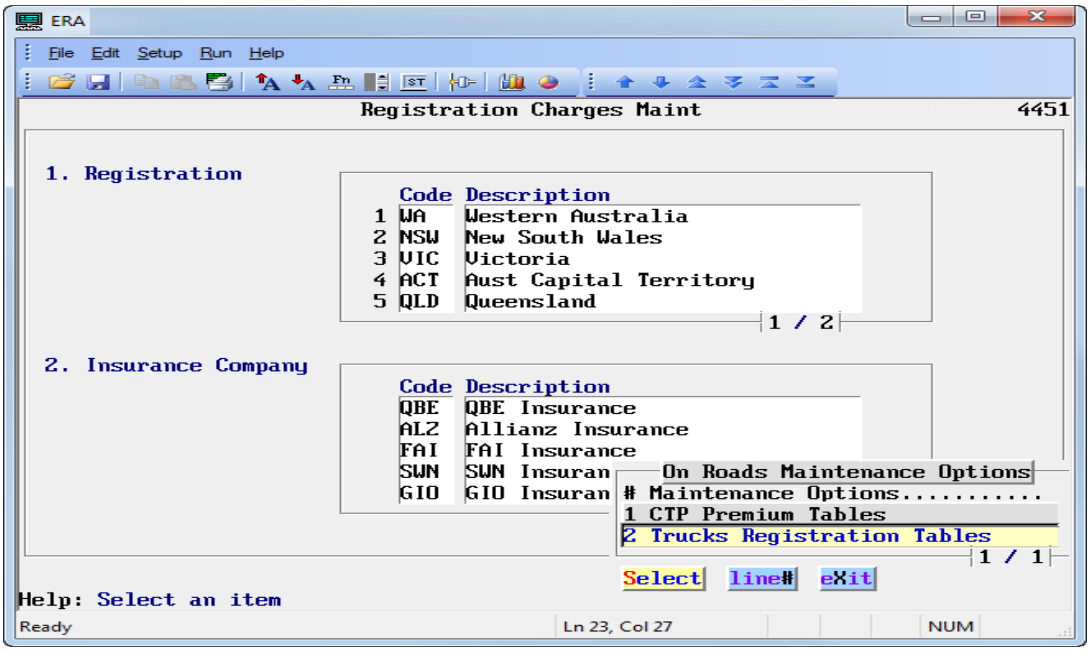
Select ***4451 – Registration Charges Maint*** and the following screen will be displayed:



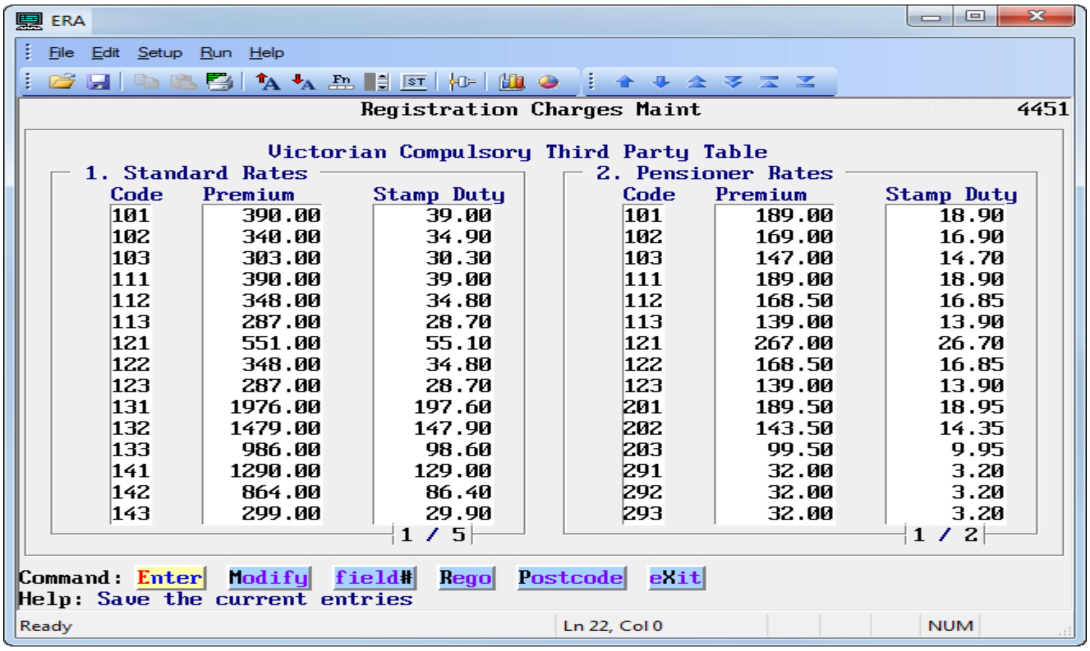
Select field 1 ***Registration*** and select ***detaiLs*** from the command line and the following screen will be displayed:



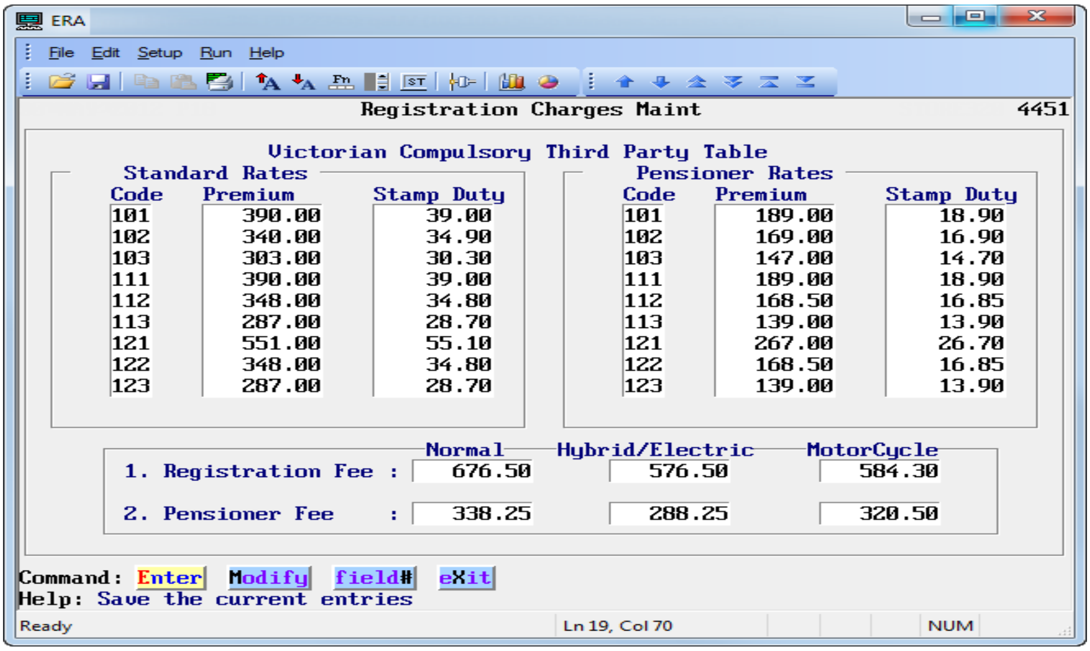
Select the ***Victoria*** state code from the lookup and the following screen will be displayed:


ERA
File Edit Setup Run Help
Registration Charges Maint
4451
1. Registration
Code Description
1 WA Western Australia
2 NSW New South Wales
3 VIC Victoria
4 ACT Aust Capital Territory
5 QLD Queensland
1 / 2
2. Insurance Company
Code Description
QBE QBE Insurance
ALZ Allianz Insurance
FAI FAI Insurance
SWN SWN Insuran
GIO GIO Insuran
On Roads Maintenance Options
Maintenance Options..........
1 CTP Premium Tables
2 Trucks Registration Tables
1 / 1
Select line# eXit
Help: Select an item
Ready
Ln 23, Col 27
NUM

Select option 1 ***CTP Premium Tables*** and the following screen will be displayed:



Select ***Rego*** from the command line and the following screen will be displayed:



Four new fields have been added in the above screen to include the registration fees for Hybrid vehicles and Motor Cycles.

Registration Fee

Normal	Enter the registration fee for normal light vehicles.
Hybrid/Electric	Enter the registration fee for hybrid vehicles.
Motorcycle	Enter the registration fee for Motorcycles.

Pensioner Fee

Normal	Enter the pensioner registration fee for normal light vehicles.

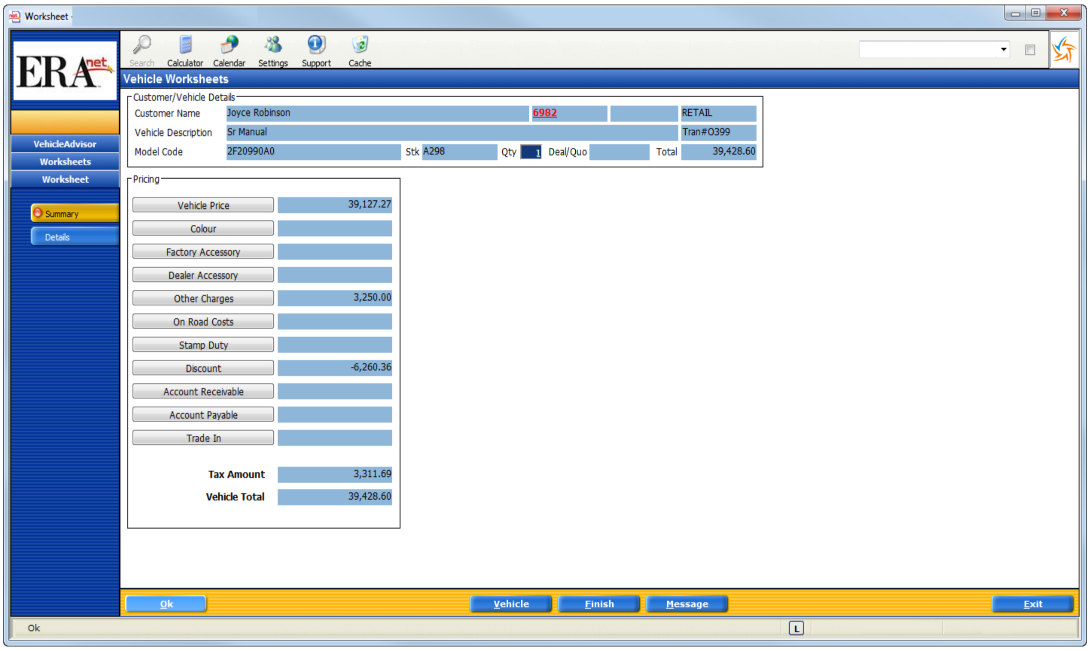
Hybrid/Electric	Enter the pensioner registration fee for hybrid vehicles.
Motorcycle	Enter the pensioner registration fee for Motorcycles.

Select ***Enter*** from the command line to save the changes.

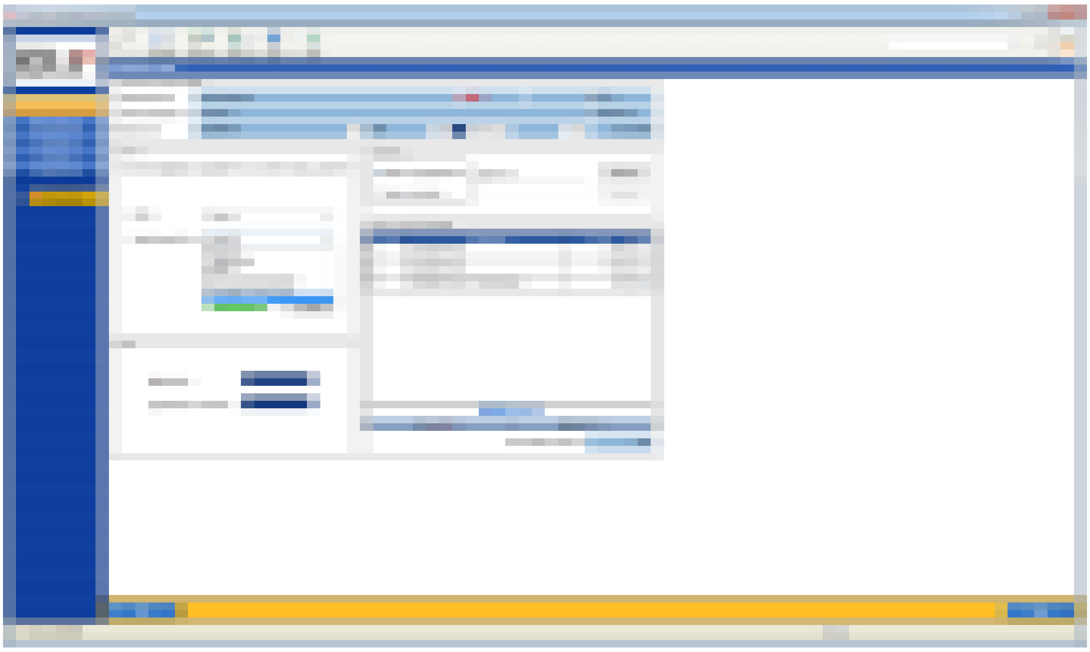
The Process

The user is able to view the Demo commercial stamp duty type from the ERAnet On Road Costs screen.

Select ***Showroom*** menu followed by ***Vehicle Advisor*** to create a worksheet and the following screen will be displayed:



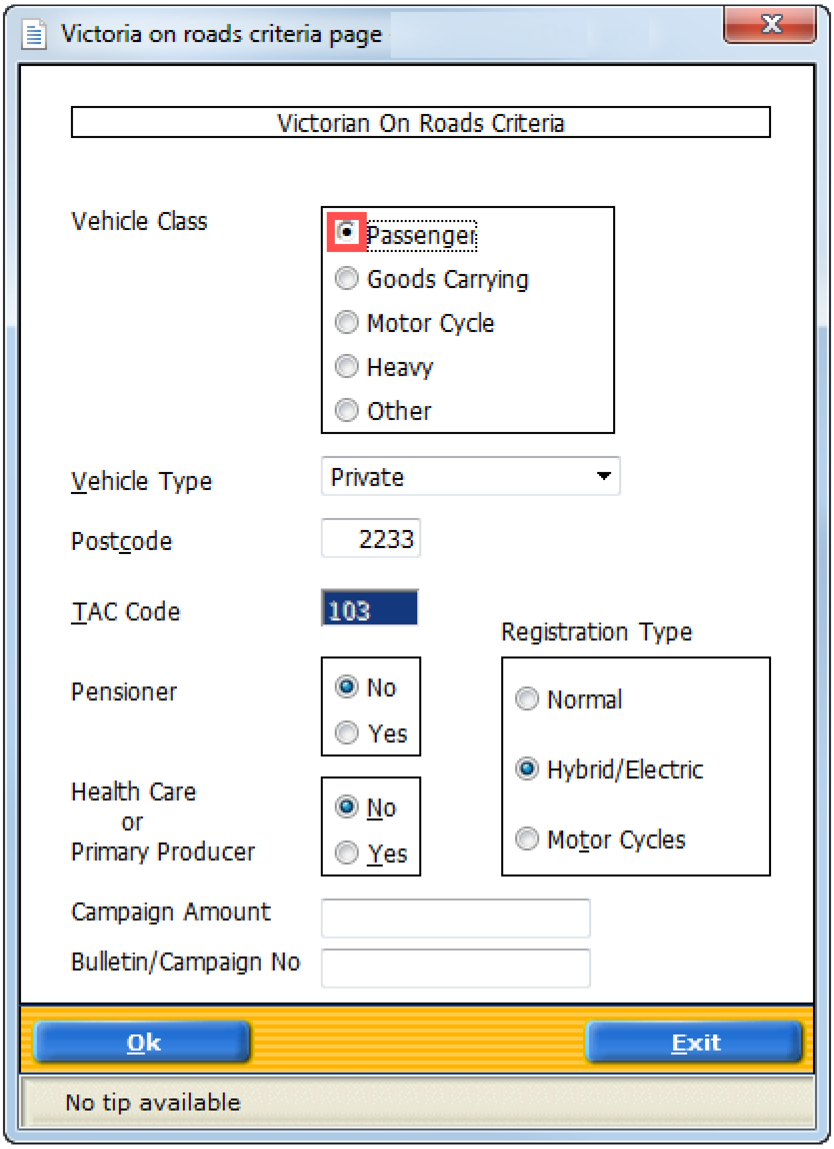
Select the **On Road Costs** button and the following screen will be displayed:



State	Select ***Victoria*** from the drop down list.

Stamp Duty Type	There is a new option ***Demo Commercial*** available in the drop down list. Selecting this option will apply new stamp duty rates to the worksheet as per the setup in 4442 - Stamp Duty Maintenance.

Note: Demo Commercial stamp duty type will only be displayed in the lookup for **new** vehicle worksheets.
Select a Stamp duty type other than demo and click on the ***Criteria*** button and the following pop-up screen will be displayed:



New radio group ***Registration Type*** has been added in the above screen.

Normal	This radio button will be automatically selected for normal vehicle.
Hybrid/Electric	This radio button will be automatically selected if the vehicle has been setup in 0626 – New Vehicle Model Maintenance as a Hybrid vehicle.
Motor Cycles	This radio button will be automatically selected if the user has changed the vehicle class to Motor Cycle.

Select ***Ok*** to get the registration fee for the vehicle and return to the On Road Costs screen.

Benefits

This enhancement will now allow the user to calculate the stamp duty for Demo commercial vehicles, hybrid vehicles and Motor cycles. This functionality is now complying with current legislation in Victoria.

0626 – Updating pricing for new inventory.

Enhancement

Overview

If the Dealer changes the price in 0626 either list or cost a popup will now appear to allow the dealer the choice of whether or not to update exiting stock.

Important to Note

Vehicles that have been purchased via 0064 will not be updated as part of the 0626 process.

Why

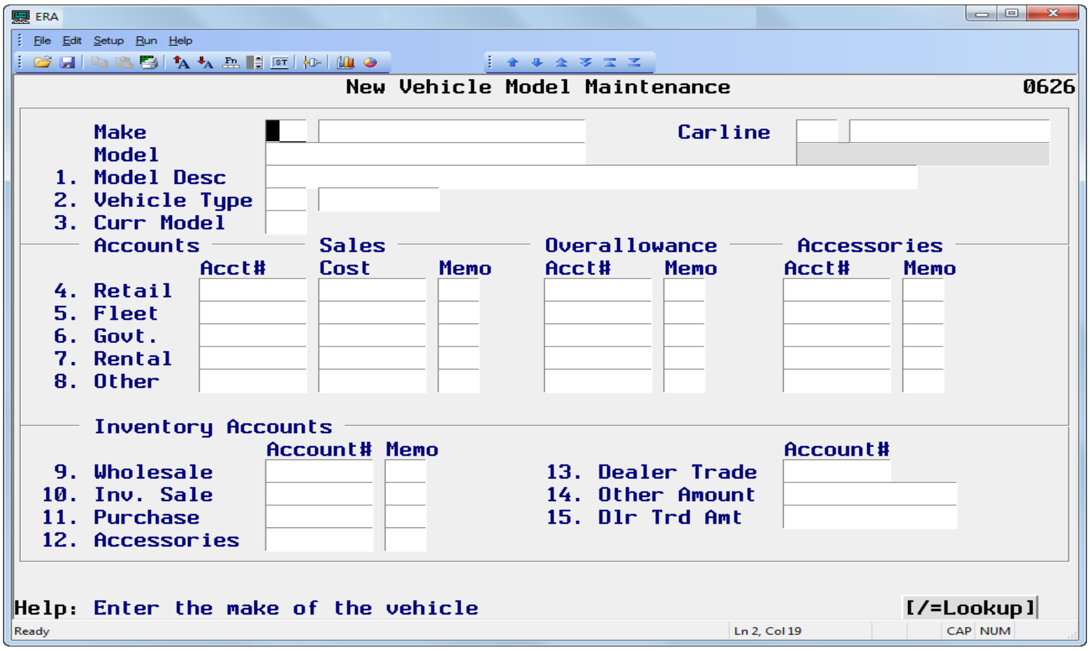
This will allow Dealers to align 0626 price changes (list or cost) to any current worksheets and new inventory stock.

Screens

0626 - New Vehicle Model Maintenance
4006 - New Vehicle Maintenance
4004 - Order Entry

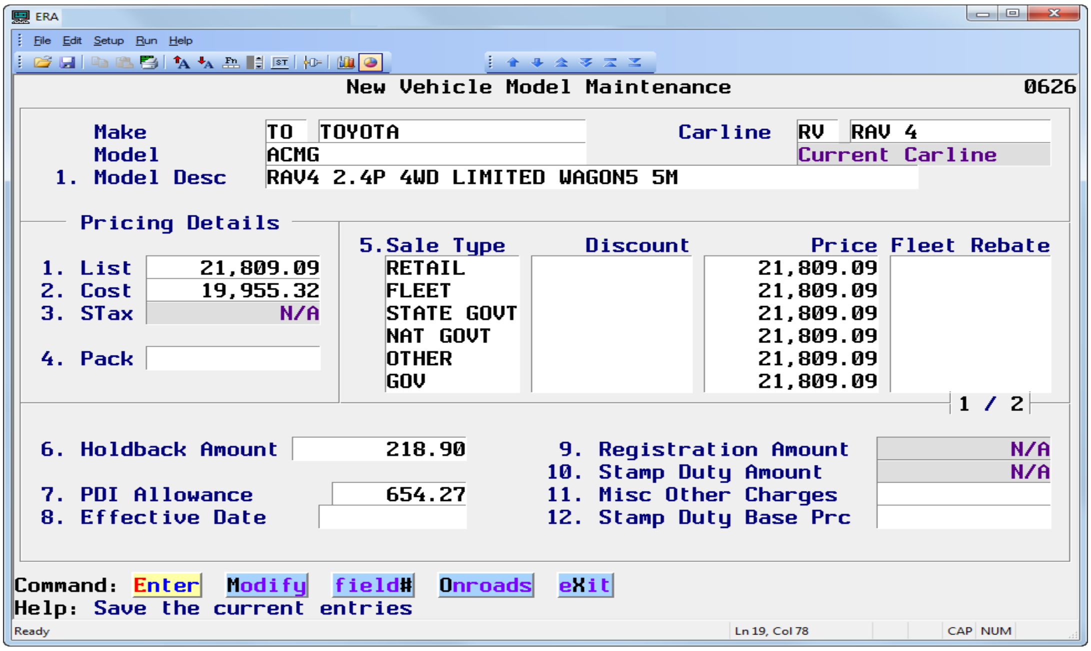
The Process

Select ***0626 – New Vehicle Model Maintenance*** and following screen will appear:



Make:	Enter a ***Make*** *or select a Make from the available lookup.*
Carline:	Enter a ***Carline*** or select a Carline from the available lookup.
Model:	Enter a ***Model*** or select Model from the available lookup.

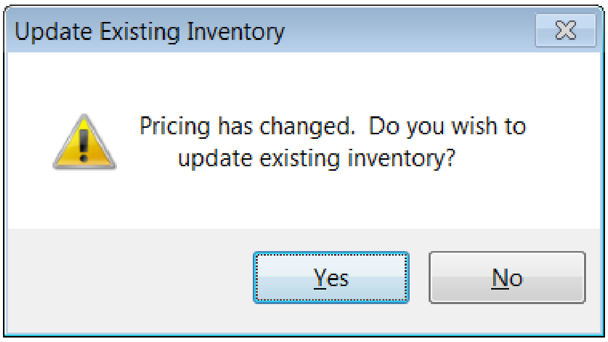
Select ***Veh*** option from the command line and the following screen will be displayed:



The list price will update all vehicles in inventory with the cost price which includes any prices in option 4. Pack and option 11. Misc Other Charges.

Updating inventory will also affect existing worksheets that have a status of “Q”uote or “W”orksheet.

Once have entered all your data the following pop-up will appear:



If you select ***Yes*** – all existing inventory will update with the current prices.
If you select ***No*** – Only new inventory will be update with the current prices.

4124 – Rebuild Sales Activity Analysis

Enhancement

Overview

An Enhancement has been made to new executable 4124 – Rebuild Sales Activity Analysis. This utility will rebuild the sales history.

Why

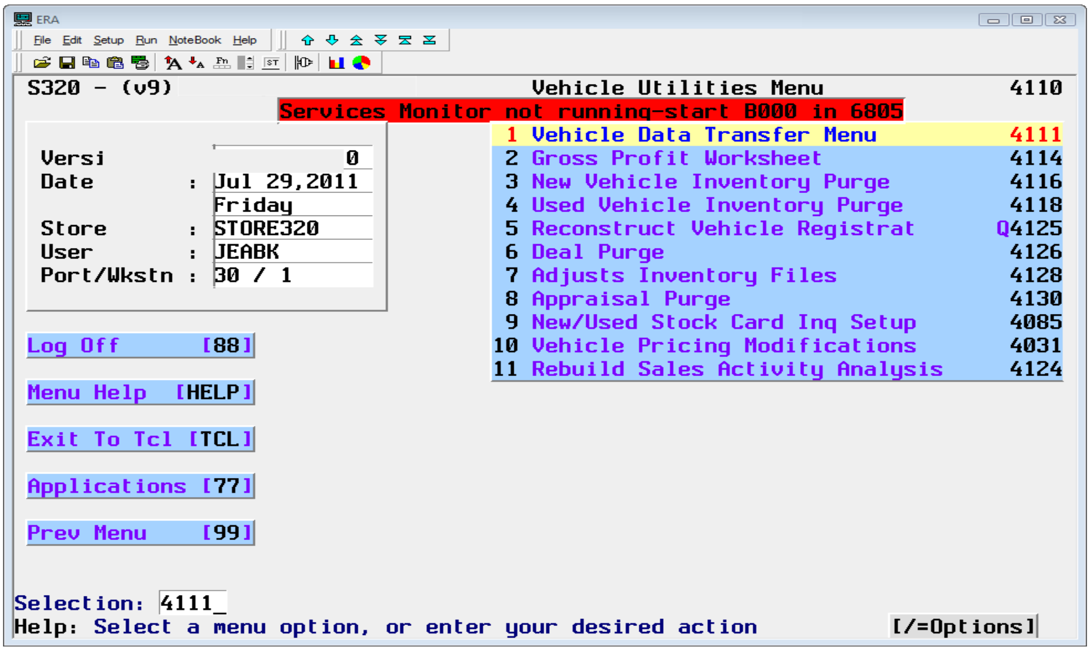
This change was made at the request of the Customer Development Committee (CDC) to enhance existing functionality.

Screens

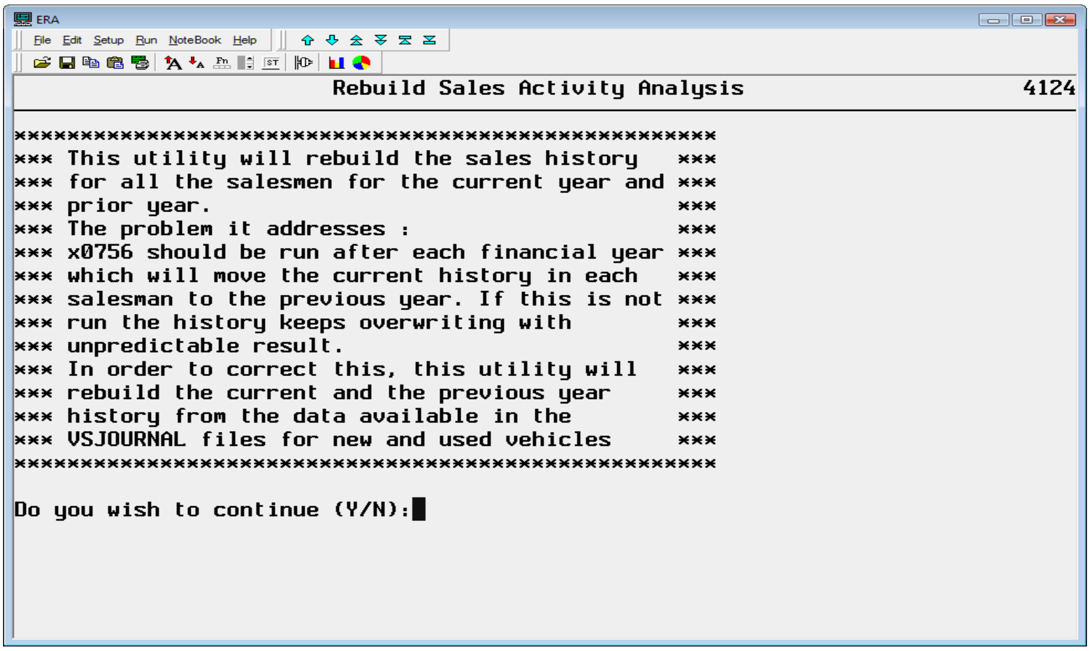
4111 – Vehicle Utilities menu
4124 – Rebuild Sales Activity Analysis

The Changes

The new executable is under the ***Vehicle Utilities menu***, enter ***4111– Vehicle Utilities menu*** and the following screen will be displayed:



Enter ***4124 – Rebuild Sales Activity Analysis***, in the selection field and the following screen will be displayed:



This utility will rebuild the sales history for all the salesmen for the current year and prior year.
The problem it addresses: executable 0765 should be run after each financial year which will move the current history in each salesman to the previous year. If this is not run the history keeps overwriting with unpredictable result.

In order to correct this, this utility will rebuild the current and the previous year history from the data available in the *VSJOURNAL* files for new and used vehicles.

Do you wish to continue (Y/N)	Enter ***Y*** for ***Yes*** to this question then ***Rebuild Sales Activity Analysis*** will be process. Enter ***N*** for ***No*** to this question to not process any of ***Rebuild Sales Activity Analysis***.

Once finished the process, select any key to return back to the main screen.

Benefits

This enhancement will now allow the dealer to rebuild the sales history for all the salesmen for the current year and prior year.

4160 - New flag for accessory codes with $0.00 Parts.

Enhancement

An enhancement has been made to OEM Dealer Accessory updates to warn salespeople when adding accessories to a worksheet that the parts pricing is not yet available. This is a request from our dealer network.

Overview

A new warning message has been added to the Vehicle Advisor accessory screen so that if a dealer accessory is added to a worksheet, and has a $0.0 value, the salesperson is told that the parts pricing is not yet available and to adjust the pricing of the accessory manually.

Why

Currently when Pentana Solutions receives data from an OEM & build the Accessory Codes for our dealer network ERAnet does not hi-light to the sales people at the dealership that the part that has not yet been entered into ERA Factory Master Data files resulting in the worksheet creation with this accessory at a $0.00 value in ERAnet.

Screens

- ERAnet Showroom

- Vehicle Advisor

4160 - Dealer Accessory Codes

Minimum Requirements

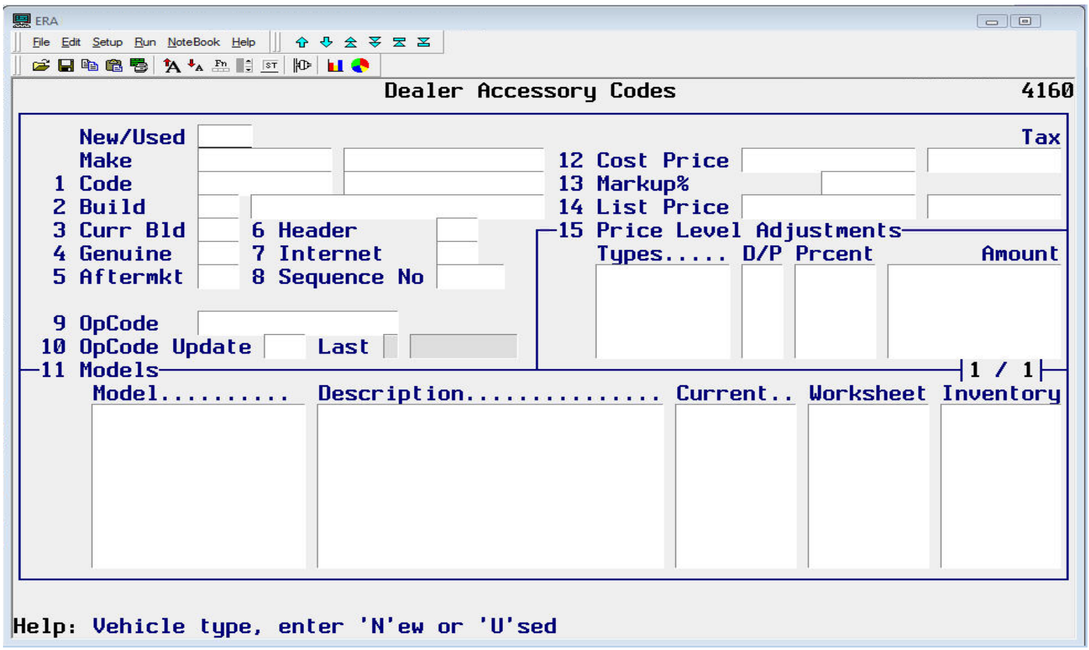
ERAnet version V9
ERAnet Showroom
Optional Software - SERVC-ACCY-(MAKE)

The Setup

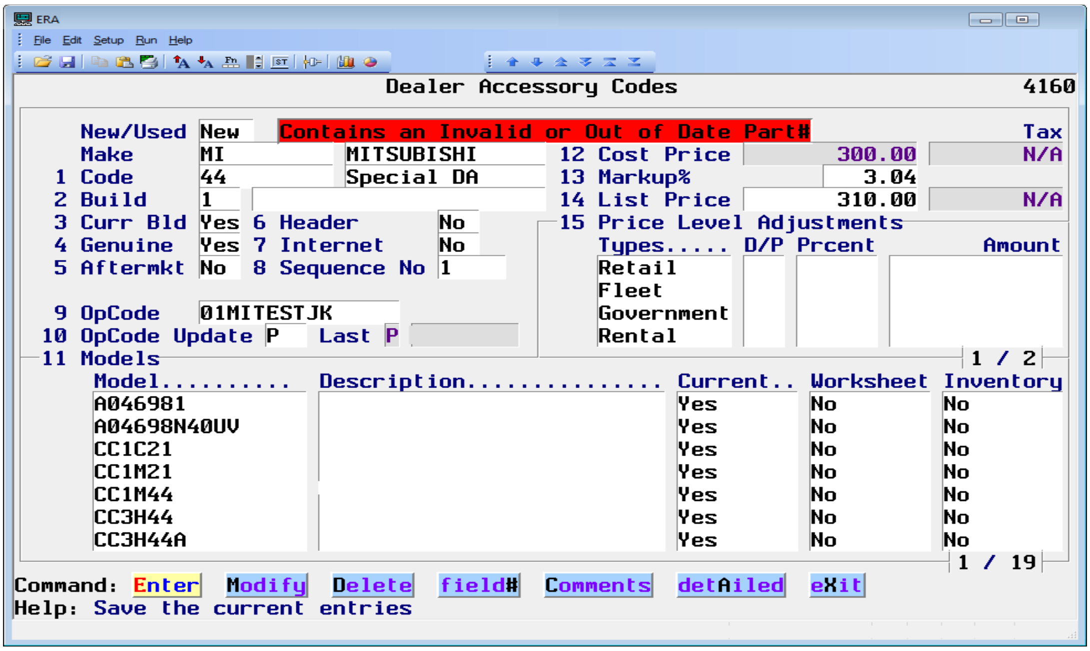
OEM Services will deploy this new program on site and will take effect immediately. *There are no dealer set-up requirements.*

The Changes

Select ***4160 – Dealer Accessory Codes*** and enter the required make and dealer accessory code. **Note:** Example data represented below - *These are not valid OEM accessory or operation codes.*

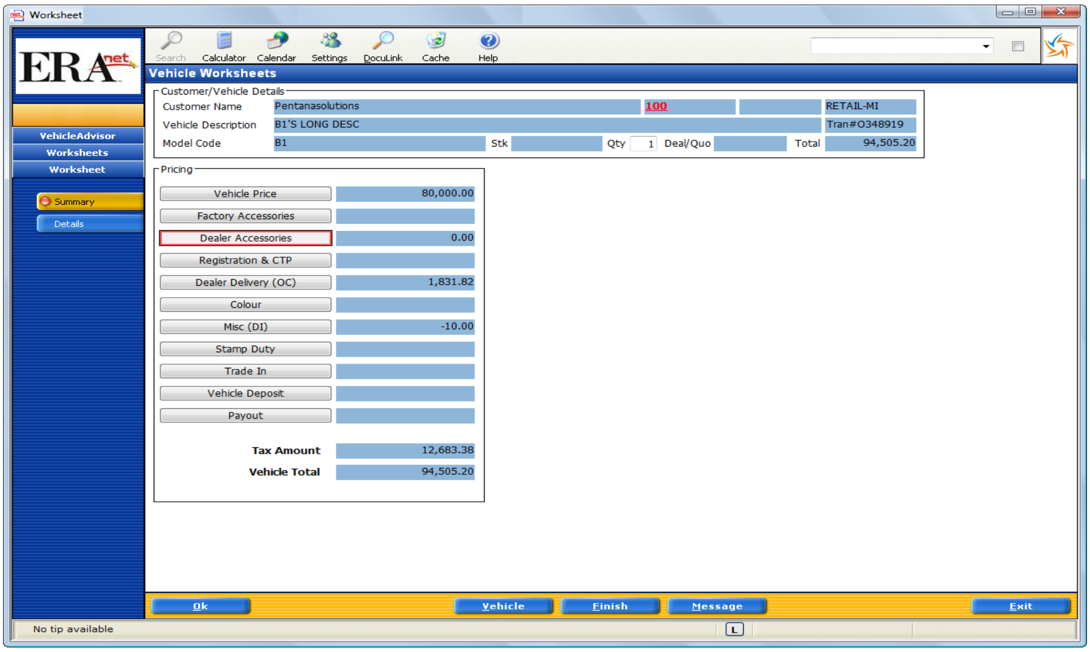


Select 2 - ***Build*** and the following warning message will be displayed if the Opcode has the new flag associated in the build.

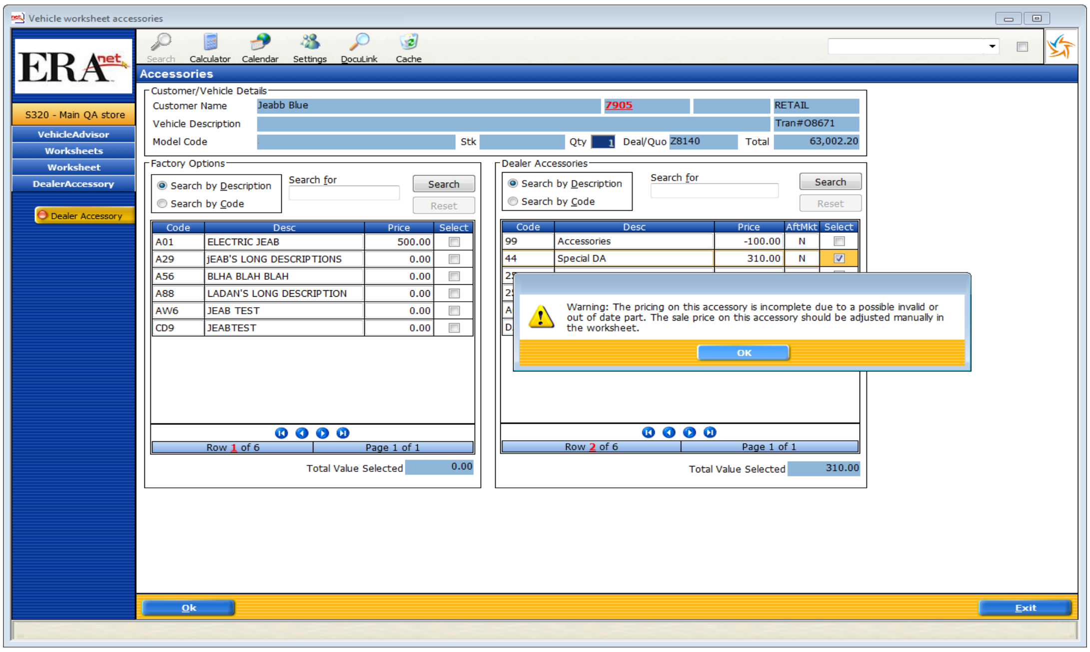


From the Showroom menu, select Vehicle Advisor and enter the required salesperson information. As per existing functionality, create a worksheet and select the vehicle make set up in ***4160 – Dealer Accessory Codes***:

Select **Ok** from the action bar and the ***Vehicle Worksheet*** screen will be displayed:



Select the ***Dealer Accessories*** button and the ***Accessories*** screen will be displayed



A NEW warning message will appear when a dealer accessory is selected that falls under the new "Flag". The user will need to manually adjust the pricing of this accessory in the details section of ERAnet worksheet.

Select **Ok** from the action bar to save the record and proceed with the worksheet as per existing functionality.

Benefits

Each time an accessory is manually maintained in ***4160 - Dealer Accessory Codes*** and has a service operation code attached; which also has parts on it, that has ***NO*** list price entered as yet, then the accessory will be flagged to popup this new warning message. The same logic has been put into ***3628 - Menu Pricing Update*** to flag accessory codes that have $0.0 value.

Activation Key

SERVC-ACCY-(MAKE)

4168 – Miscellaneous

Enhancement

Overview

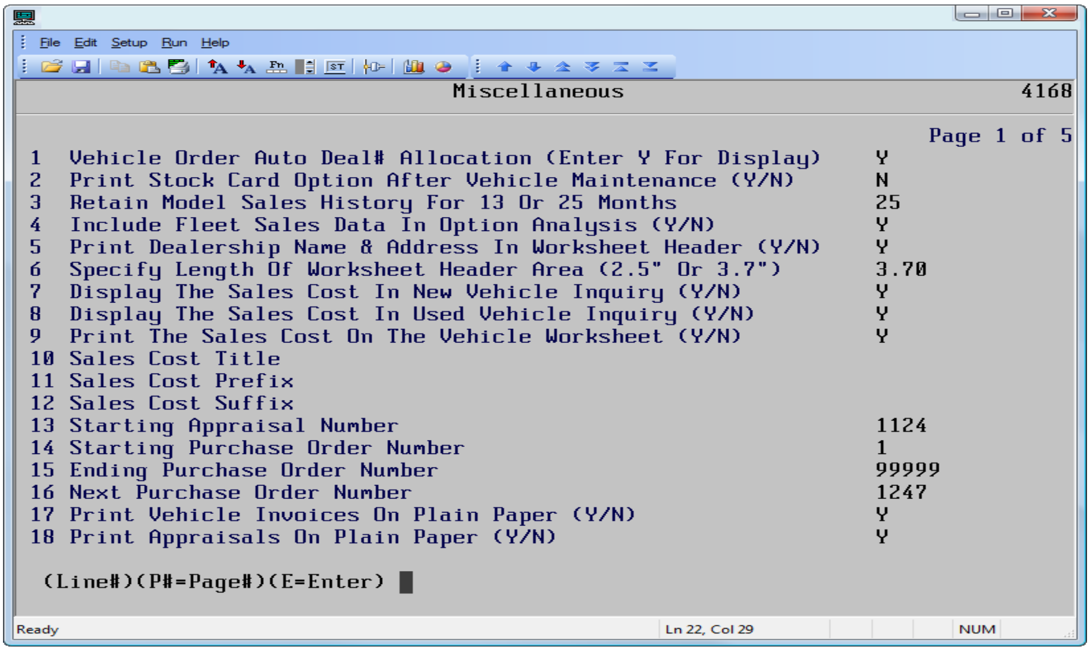
A new option has been added to 4168 – Miscellaneous to allow the user to choose if they would like print Miscellaneous Accessories on Repair Orders.

Why

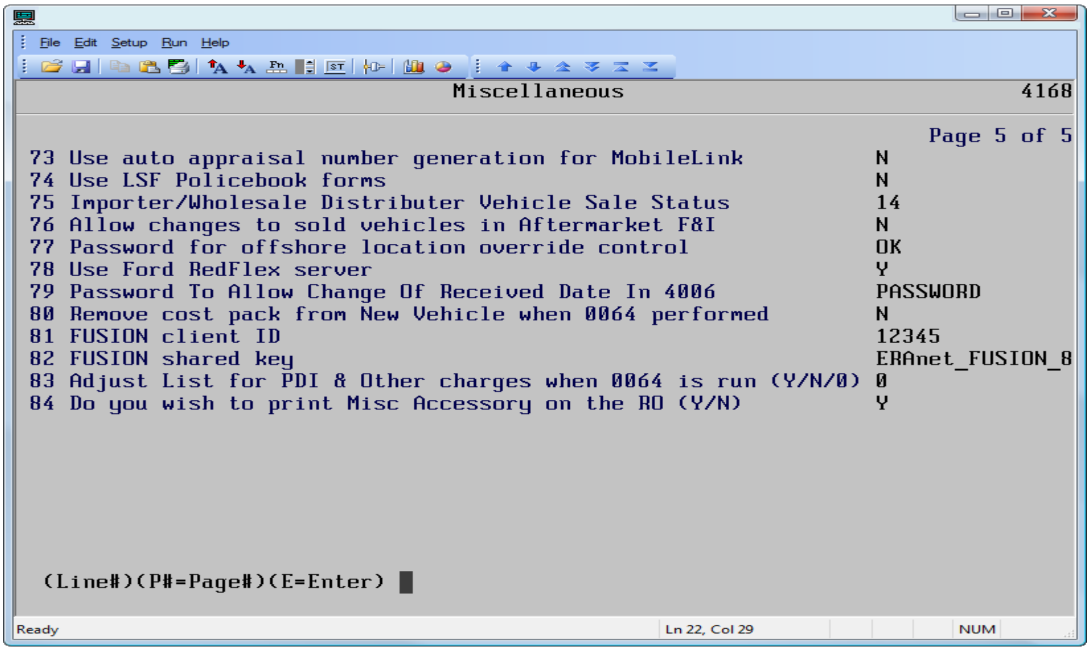
This question has been added as part of a customer request.

The Setup

Select ***4168 – Miscellaneous*** and the following screen will be displayed:



Select the ***Page*** option from the command line input ***P5*** and select ***Enter*** and the following screen will appear:



Question 84 is a new spec question. This question has been added to control the printing of 99 accessories on repair orders.

Spec Q84 if "Y"	The "99" Miscellaneous Accessories for the original stock record when the will print on the Repair Order.
Spec Q84 if "N"	The "99" Miscellaneous Accessories will not print on the Repair Order.

ERAnet – TPI GST Threshold effective July 1 2012

Enhancement

Overview

The TPI GST Car Limit can now be defined separately to the LCT threshold(s). New fields in ***0895 - Tax Setup Maintenance*** have been added to allow for this.

Why

This change was completed due Government TPI Changes effective July 1 2012.

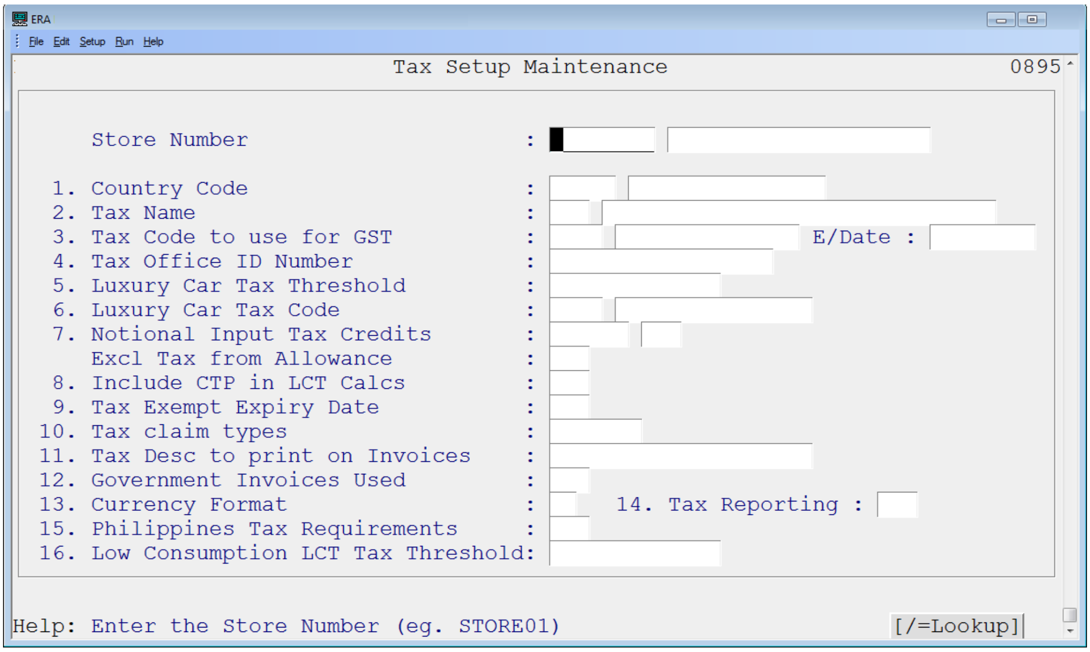
Screens

0895 - Tax Setup Maintenance

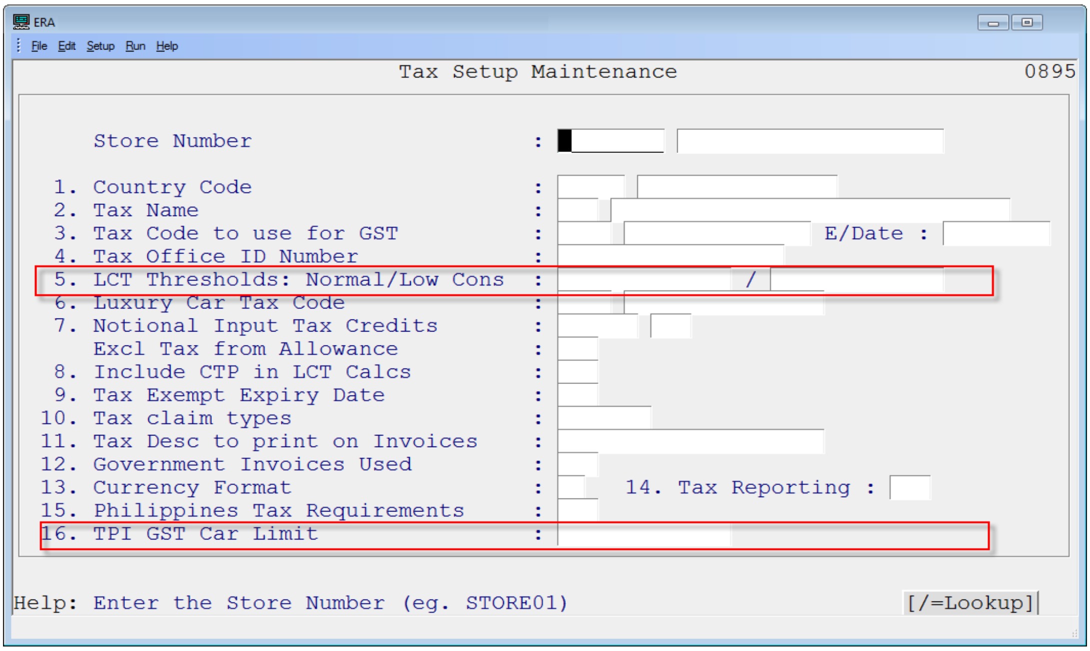
The Setup

Select ***0895 - Tax Setup Maintenance***, enter the ***Store Number*** and the following screen will be displayed:

Before Change



After Change



Changes to the above screen are:-

5. LCT Thresholds: Normal/Low Cons	***Low Consumption LCT Tax Threshold*** field (previously line 16) has been moved to display in field #5. Next to the LCT threshold. **Note:** The tax code is not required to be changed.
16. TPI GST Car Limit	***Displays*** the TPI GST threshold amount.

Note: The fields used for these changes are required to be updated with the new threshold limits.

Benefits

This change will ensure that the TPI GST calculations can be done separately to the LCT thresholds.

ERAnet – Gross Profit Report

Enhancement

Overview

A NEW printable ***Gross Profit Report*** is now available from ERAnet ***Vehicle Advisor*** Sales Manager Review and ERAnet ***Vehicle Sale process***. Existing ERAnet ***Showroom*** worksheet Gross Profit report functionality has not changed.

Why

This change was made to enhance existing functionality.

The Changes

The following changes to Gross Profit Calculations have been developed.

Change 1:

A NEW question for Holdback treatment in the new GP report has been added, and can be configured to print separately of the vehicle costs.

Change 2:

2 New locations available to print the NEW Gross Profit Report in ERAnet, In ***Vehicle Advisor*** Salesman diary ***Sales Manager Review*** and in ERAnet ***Vehicle Sale Process***.
Note: This new menu option will only appear once the worksheet is at a Deal status.

Change 3:

4544 Q13 Print Cost Pack on Deal Comparison and Gross Profit Reports (Y/N) has been reworded. Old Q13 was Print Cost Pack on Deal Comparison Report (Y/N).

Screens

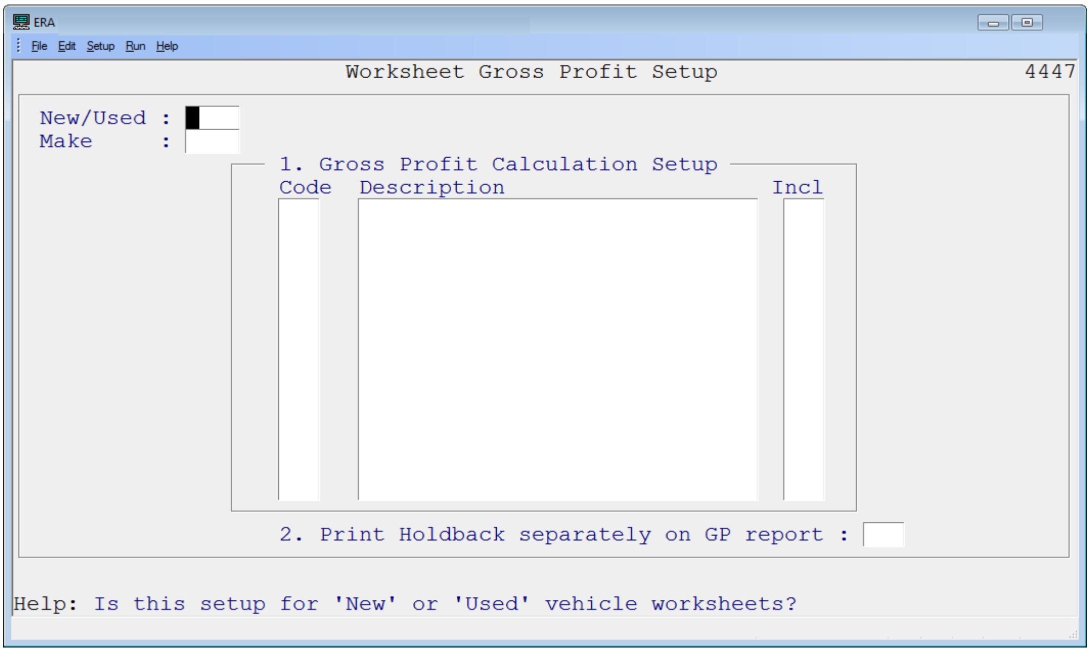
- Showroom
- Vehicle Advisor
- Vehicle Sale Process
4447 - Worksheet Gross Profit Setup

The Setup

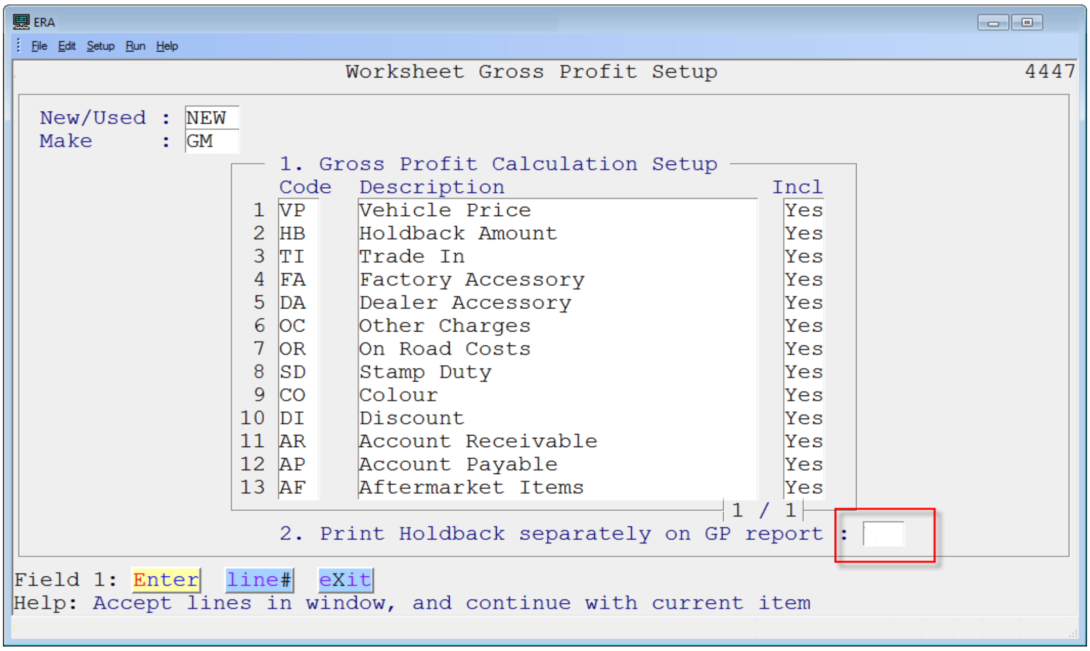
ERA2

The following ERA2 setup is required to be checked and updated.

Select ***4447 - Worksheet Gross Profit Setup*** and the following screen will be displayed:



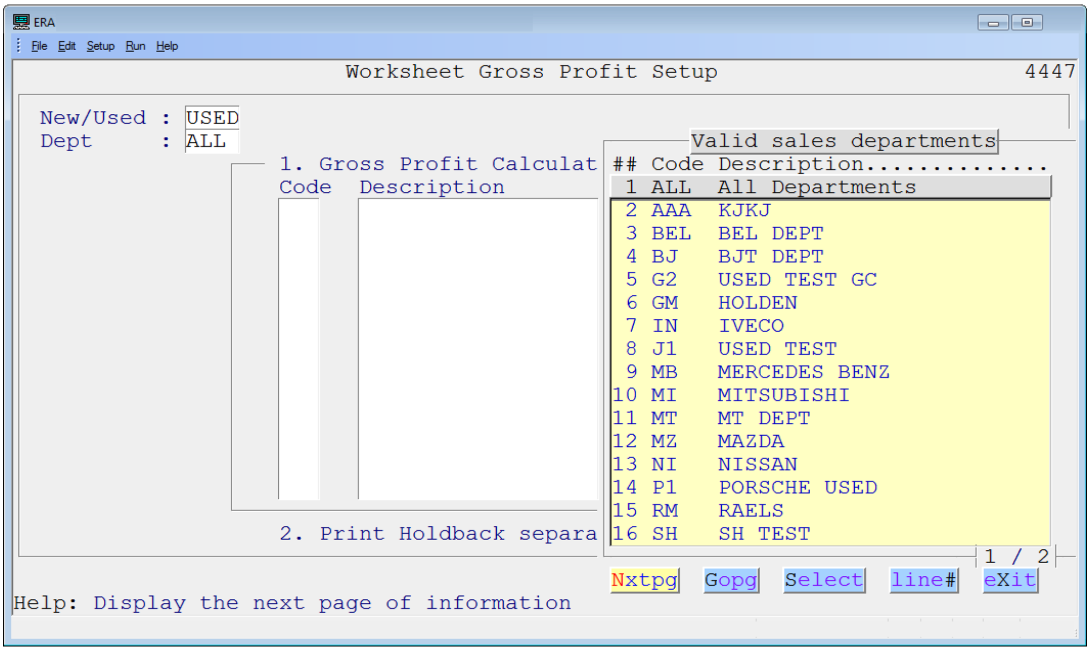
Enter ***New,*** enter the required ***Make,*** select ***Modify*** and the following screen will be displayed:



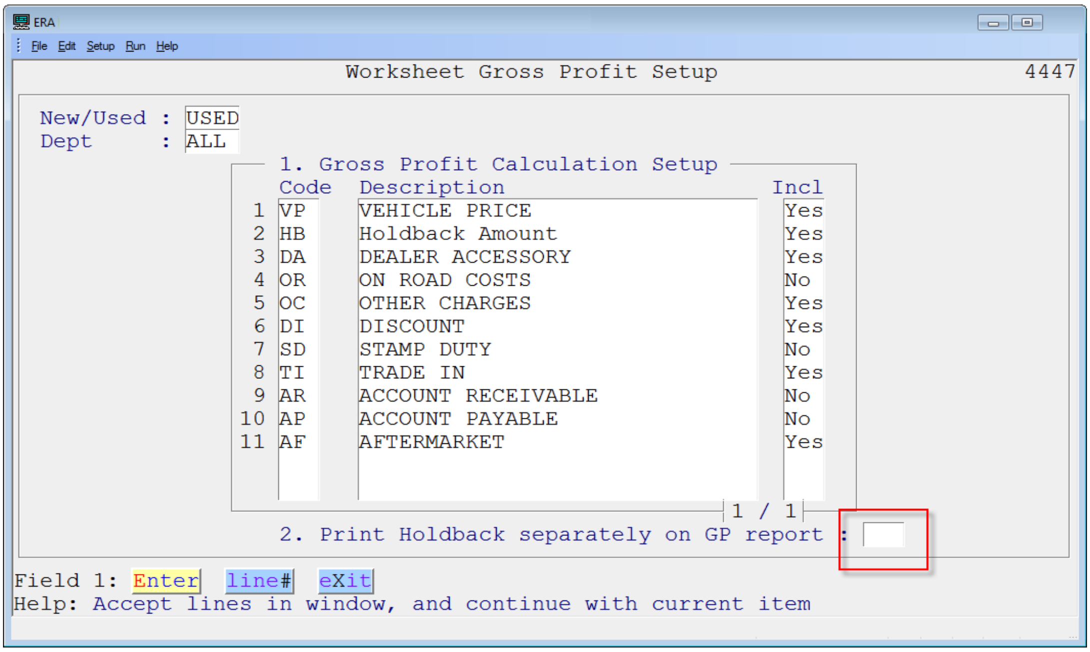
Holdback Amount	Select ***Yes/No*** to Include Holdback in Gross Profit calculations. **Note:** The ***Default*** setting will set the question to ***No***. Holdback will be included (hidden) in the cost price of the vehicle. If this question is set to ***Yes*** the Holdback line item will appear on the Gross Profit Report.
Print Holdback separately on GP report	Select ***Yes/No*** in Field # 2 ***Print Holdback separately on GP report***.

Select Enter to save any changes, this will exit the screen and take the user back to the ERA2 main menu.

Enter ***Used*** and the Make field will default to ***Dept***. Users can setup calculations from the available / Lookup. Select the relevant ***Dept*** Line # to setup by sales departments.



Select ***ALL*** sales departments and the following screen will be displayed:



Holdback Amount	Select ***Yes/No*** to Include Holdback in Gross Profit calculations. **Note:** The ***Default*** setting will set the question to ***No***. Holdback will be included (hidden) in the cost price of the vehicle. If this question is set to ***Yes*** the Holdback line item will appear on the Gross Profit Report.
Print Holdback separately on GP report	Select ***Yes/No*** in Field # 2 ***Print Holdback separately on GP report***.

Select Enter to save any changes, this will exit the screen and take the user back to the ERA2 main menu.

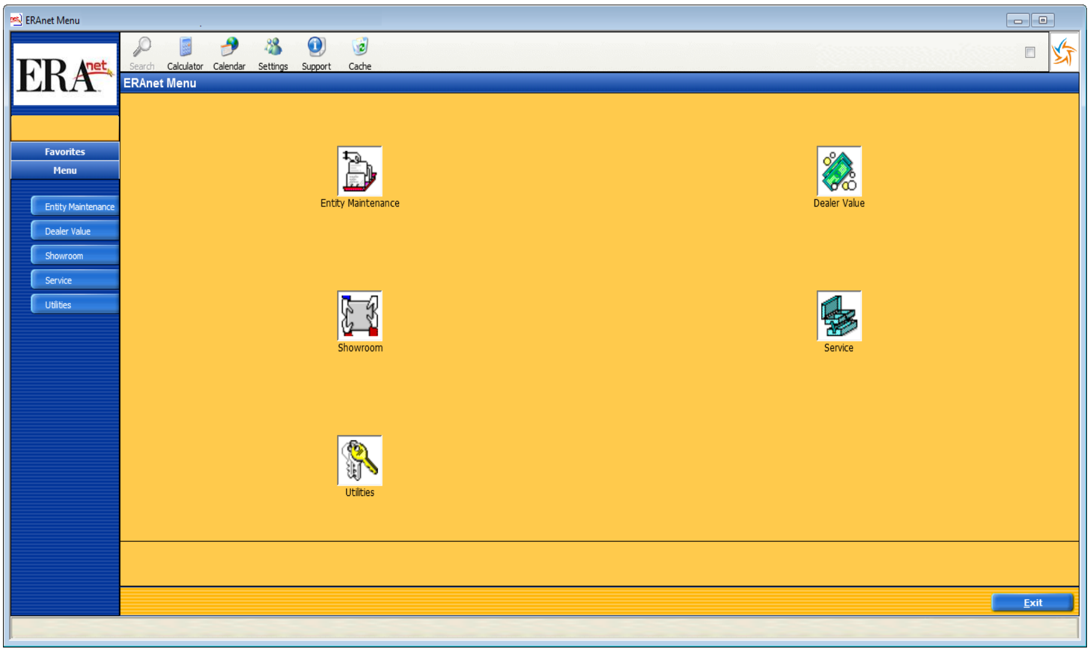
The Process

ERAnet

 - Showroom

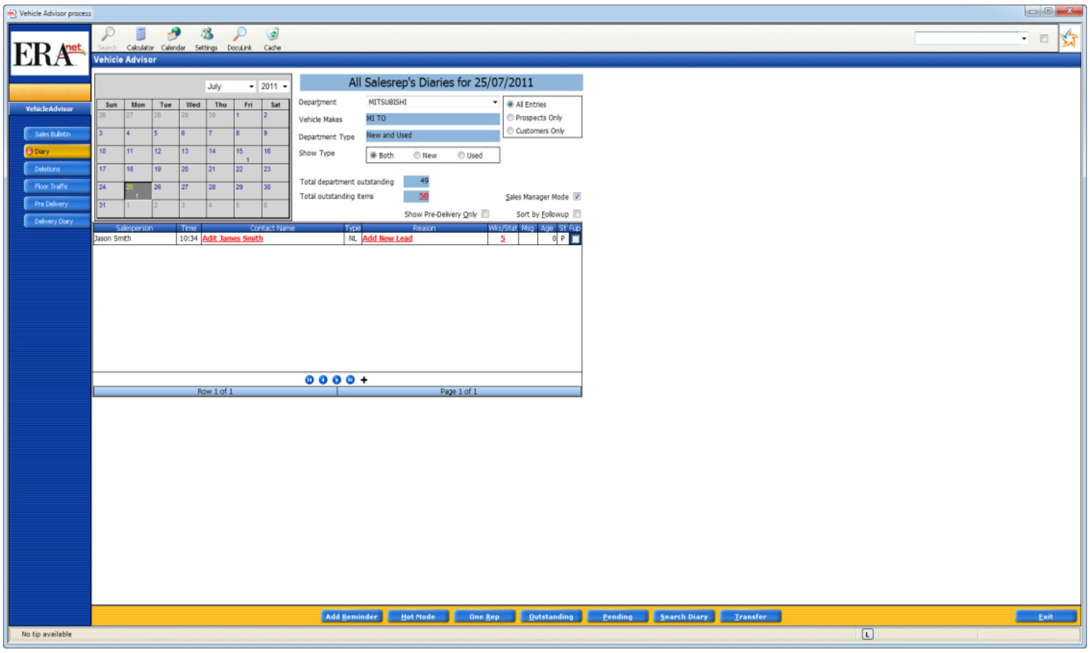
 - Vehicle Advisor

Log to ***ERAnet*** as per existing functionality and the following screen will be displayed:

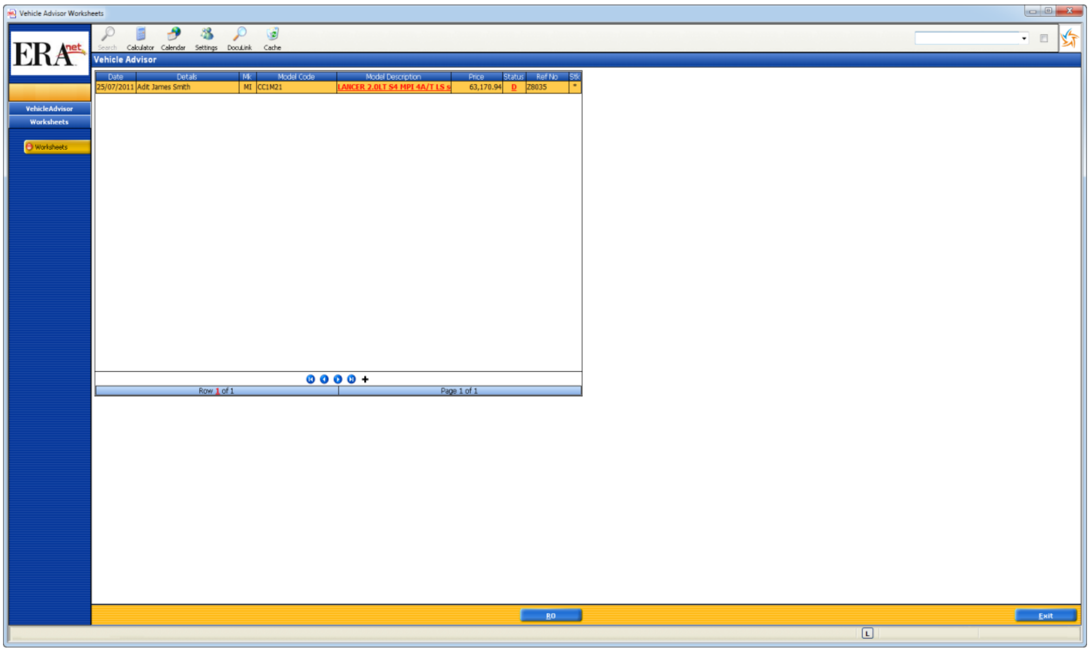


From the ERAnet main menu, select  ***Showroom***, followed by  ***Vehicle Advisor.***

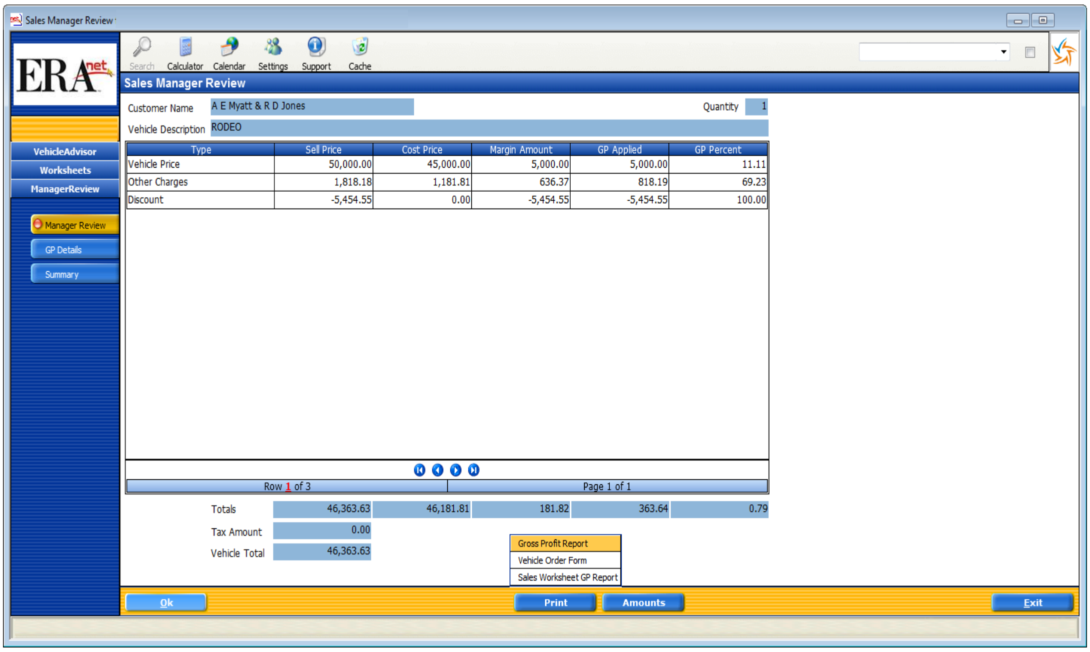
To view the ***Gross Profit Report***, log in as a ***Sales Manager*** as per existing functionality and the following screen will be displayed:



Select the relevant customer by clicking on the Wks/Stat hyperlink and the following screen will be displayed:



Click on the relevant Model Description hyperlink and the following screen will be displayed:



In Sales Manager Review, the ***Gross Profit Report*** option is added to the print button popup menu.

Select **Print** from the action bar and a popup menu will be displayed.

Select the **Gross Profit Report** followed by the required printer as per existing functionality.

Following is an example of the emailed report from  ***Vehicle Advisor*** Sales Manager Review:


```
                                         Gross Profit Report
Deal Number (New)    H04                                                       *Deal Amounts Only*
Stock Number                    HSV HSV E2 Clubsport 6.2L Manual
Customer Number      8282       Coca-cola

Sell Price (from contract)                       Cost Price   Profit      Profit%  Reference
----------------------------------------------- ------------ ----------- -------- ------------

Vehicle Price                         60,000.00    51,515.00    8,485.00    16.47

Factory Claim                              0.00    -2,000.00    2,000.00   100.00

Other Charges/Dealer Delivery          1,321.00     1,321.01
                   Dealer Delivery     1,300.00     1,300.00         N/A
        Admin Warranty (12 Months)         0.00         0.01         N/A
                                          21.00        21.00        0.00     0.00

Total Sell Price                      61,321.00    50,836.01   10,485.00    20.63

                          Holdback                                720.00

Bonus                                                            -1,930.00
                   SERIES 2 RUNOUT                               -1,930.00
                    APRIL 1K BONUS                                    0.00

Total Sales Gross                                                 9,275.00

                         Cost Pack                                 -485.00

Total Gross                                                       8,790.00
```

The Report Header information contains the following details:

Deal Number	This field will display the ***Deal Number*** and will also have (New) or (Used) to indicate if the report is for a ***New*** or ***Used*** vehicle.
Stock Number	This field will display the ***Stock Number***, vehicle Make, Carline and Model description details. **Note:** *Stock Number* detail is not included in the*Deal Amounts Only* version of the report.
Customer Number	This field will display the ***Customer Number*** and ***Customer Name***.
Deal Amounts Only	*Deal Amounts Only* indicates that the report was printed from ***Vehicle Advisor*** Sales Manager prior to stock allocation. This will print a Deal version of the Gross Profit Report that ***only*** includes costing from the ***Worksheet/Deal***. **Note:** This field will be an indicator as to where the ***Gross Profit Report*** was printed from.

The report Detail section contains the following headings:

Sell Price (from Contract)	This field will display the description of the item and ***Sell Price*** from the Worksheet. **Note:** This heading is not the list price.
Cost Price	This field will display the ***Cost*** price of each item from the Worksheet in ***Vehicle Advisor*** Sales Manager Review. This field will display the ***Cost*** price of each item from Vehicle Inventory in ***Vehicle Sale Process.*** **Note:** The ***Cost*** from the Vehicle Inventory will be used if it is available and the deal was updated from Inventory.
Profit	This field will display the profit amount per category or individually for Other Charges. They can be individually setup in ***4449 - Other Worksheet Charges Maint*** to be included code by code in Gross Profit calculations. The profit amount is ***Sell*** price minus ***Cost*** price. **Note:** This field will display N/A if the equivalent codes in ***4447 - Worksheet Gross Profit Setup*** are setup to not be included in the Gross Profit Report.
Profit%	This field will display the Profit percentage % calculated as a percentage % of the Profit to the ***Cost*** price. **Note**: This field will not display if the equivalent ***4447 - Worksheet Gross Profit Setup*** is set to not be included in the Gross Profit Report.
Reference	This field will display the Reference number relating to wherever the item details came from if it exists or is required. **Note:** This displays Factory Claim/Factory Rebate references.

Note: *All GP Details are run in TAX Exclusive mode.*

Individual sections:

Vehicle Price	This field will display the Base Vehicle Price and Cost from ***0626 - New Vehicle Model Maintenance***. **Note:** The cost may include the Holdback amount if it is setup to not show separately but is to be included in the Gross Profit Report. Refer to executable ***4447 - Worksheet Gross Profit Setup***.
Factory Claim	This field will display the Factory claim amounts and will print for ***New*** vehicles only based on ***0626 - New Vehicle Model Maintenance*** Fleet Rebate information. **Note:** This field does not have a sell price; it is a rebate from the factory and is included as a negative cost only and a 100% profit calculation.
Discount/Miscellaneous	This field will display the (DI) discount line in ***4439 Worksheet Category Description*** setup screen. The actual amount comes straight from the Worksheet and will have a selling price and no cost. **Note:** This field can be used as a *discount* or *surcharge* by entering a negative or positive amount on the Worksheet.
Repair Order Amounts	This field will display open Repair Orders. Costs are shown as ***RO XXXXX remaining balance.*** The amount displayed is calculated by subtracting any *Dealer Accessory Code* additions on each Repair Order; any costs with jobs not associated with adding *Dealer Accessories* will be included in this field. Each Repair Order job menu price from the ***3625 - Service Operations*** is purely a cost on the vehicle and will show a ***Sell*** Price amount of zero when merged from Inventory using the Update option in ***Vehicle Sale Process.*** **Note:** Once the Repair Order is closed, the actual costing amounts are added to the vehicle so these detail lines will no longer show on the report.
Vehicle Colours	This field will display ***4154 - New Vehicle Colour Codes*** amounts from the

	Worksheet or Inventory. **Note:** This is for ***New*** vehicles only.
Vehicle Factory Options	This field will display ***4156 - Factory Option Codes Maint*** amounts from the Worksheet or Inventory. **Note:** This is for ***New*** vehicles only.
Dealer Accessories & Aftermarket	This field will display the costing of each job on the Repair Order that has a Dealer Accessory or Aftermarket item attached. **Note:** Any Dealer accessory or Aftermarket accessory from the Worksheet or Inventory will print here. If the accessory is being added by a currently open repair order the estimated cost of that item will be based on the job by job repair order calculations explained in the repair order section above and the description will be prefixed with an * asterisk.
Other Charges/Dealer Delivery	This field will display any other charges from the worksheet. **Note:** This section prints differently to all the other sections of the ***Gross Profit Report***. The total *summary* line for the category does not include the Profit & Profit%; but prints each individual line instead. This is because each individual other charge code can be setup to be included in ***4449 - Other Worksheet Charges Maint.***
Registration Fees	This field will display Registration and CTP from ***4451 Registration Charges Maint*** and the ***4443 Additional Rego Charges Maint*** setup. **Note:** Details will only print here based on the selected Worksheet.
Stamp Duty	This field will display ***4442 - Stamp Duty Maintenance***. **Note:** Details will only print here based on the selected Worksheet.
Total Sell Price	This field will display the *Subtotal* of total selling price before bonuses, holdbacks and trade-ins are included.
Holdback	This field will display for ***New*** vehicles only; the Holdback amount will print here as purely a Profit figure with no sell & cost amounts. **Note:** If Holdback is setup to print separately in ***4447 - Worksheet Gross Profit Setup*** even if Holdback is $0.00 it will still print as $0.00 if the ***4447 - Worksheet Gross Profit Setup*** is set to ***Yes***.
Bonus	This field will display any bonus amounts setup in ***4163 Factory Bonus Maintenance*** that is added to the worksheet. This amount will print here as purely a Profit figure with no sell & cost price amounts.
Trade Ins	This field will display all 3 types of ***Trade Appraisals*** that can be added to a worksheet. Ie. Quick, Summary and Complete. **Note:** The reference number column will show ***OA Applied*** if an over allowance is applied to the trade-in or ***UA Applied*** if an under allowance is applied to the trade-in.
Total Sales Gross	This field will display the subtotal of *Total Sales Gross.* **Note:** This does not include cost pack.
Cost Pack	This field will display for ***New*** and **Used** vehicles. Printing an Inventory version of the report in ***Vehicle Sale Process*** of a ***New*** Vehicle Deal will detail the cost pack amount from Vehicle Inventory ***4006 - New Vehicle Maintenance.*** Printing an Inventory version of the report in ***Vehicle Sale Process*** of a ***Used*** Vehicle Deal will detail the cost pack amount from Vehicle Inventory ***4008 - Used Vehicle Maintenance.*** **Note:** If the cost pack is not on the inventory for ***New*** vehicles or you are printing a Deal Version of the report it will use the cost pack amount from the Pricing screen of ***0626 - New Vehicle Maintenance*** Field # 4. Pack.
Total Gross	This field will display the total Gross Profit.

Note: *All GP Details are run in TAX Exclusive mode.*

Select **Ok** from ***Vehicle Advisor*** Sales Manager Review screen and **Exit** as per existing functionality.

Note: If you are printing a multiple vehicle deal the report will include Vehicle 1 of 2, and Vehicle 2 of 2 calculations.

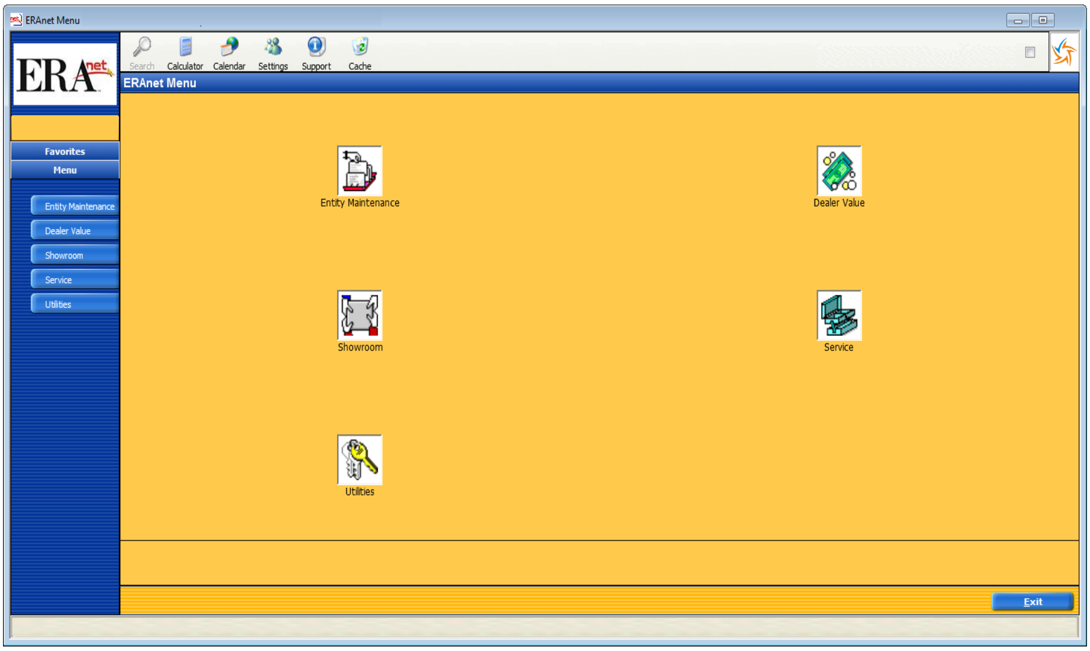
The Process

ERAnet

- Showroom

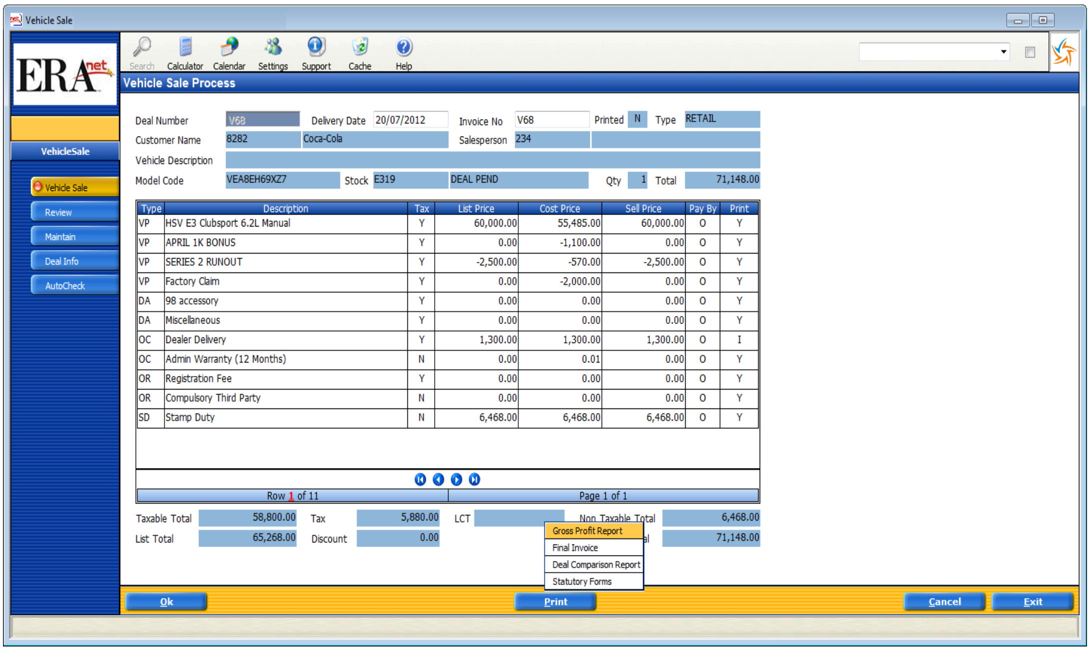
- Vehicle Sale Process

Log to ***ERAnet*** as per existing functionality and the following screen will be displayed:



From the ERAnet main menu, select ***Showroom,*** and select ***Vehicle Sale Process.***

As per previous functionality, bring a deal through ***Vehicle Sale Process.*** Select all required information and the following screen will be displayed:



In the Vehicle Sale screen, the new ***Gross Profit Report*** option is added to the print button popup menu. Select Print from the action bar and a popup menu will be displayed.

Select the Gross Profit Report and select the required printer as per existing functionality.

Following is an example of the emailed report from ***Vehicle Sale Process***:

```
                                 Gross Profit Report

Deal Number (New)     H06                                     *Vehicle Inventory Included*
Stock Number          E206       HOLDEN HSV HSV E3 Clubsport 6.2L Manual
Customer Number       8282       Coca-Cola

Sell Price (from contract)                         Cost Price   Profit      Profit%  Reference
-------------------------------------------------  ------------ ----------- -------- ------------

Vehicle Price                          60,000.00    56,705.80    3,294.20     5.81

Factory Claim                               0.00    -2,000.00    2,000.00   100.00 FC-H06Factor

RO C14037 remaining balance                 0.00         7.80       -7.80  -100.00

RO C14033 remaining balance                 0.00     3,272.48   -3,272.48  -100.00

Vehicle Colours                             0.00     1,850.00   -1,850.00  -100.00
                             Black        795.00       450.00                      CO-REF-EXT
                      Grey Leather      2,200.00     1,400.00                      CO-REF-INT

Vehicle Factory Options                     0.00        15.00      -15.00  -100.00
             Alloy Wheel Lock Nuts          0.00        15.00                      FA-REF-NO-1

Dealer Accessories                          0.00       127.52         N/A
       *S/F Alloy Wheel Locknut Set         0.00        60.52         N/A          RO C14033
                  120" exhaust tip          0.00         2.00         N/A
               *Sup Starting Cable          0.00        65.00         N/A          RO C14037

Other Charges/Dealer Delivery           1,321.00     1,321.01
                   Dealer Delivery      1,300.00     1,300.00         N/A
        Admin Warranty (12 Months)          0.00         0.01         N/A
                        Gavin Test         21.00        21.00         N/A

Total Sell Price                       61,321.00    61,299.61      148.92     0.24

                          Holdback                                 710.00

Bonus                                                            1,930.00
                   SERIES 2 RUNOUT                               1,930.00          FR-H06S2.FR

Total Sales Gross                                                2,788.92

                         Cost Pack                                -300.00

Total Gross                                                      2,488.92
```

The Report Header information will have the below details:

Deal Number	This field will show the Deal Number and will also have (New) or (Used) to indicate if the report is for a ***New*** or ***Used*** vehicle.
Stock Number	This field will show the ***Stock*** Number, vehicle ***Make***, ***Carline*** and ***Model Description*** details. **Note:** Stock Number detail is included in the*Vehicle Inventory Included* version of the report.
Customer Number	This field will show the ***Customer Number*** and ***Customer Name***.
Vehicle Inventory Included	*Vehicle Inventory Included* indicates that this was printed from ***Vehicle Sale Process*** and the costs from the vehicle inventory are included. **Note:** This field will be an indicator as to where the ***Gross Profit Report*** was printed from. This will print an Inventory version of the ***Gross Profit Report*** that includes a merging of the costing from the Worksheet/Deal and Vehicle Inventory.

The report Detail section contains the following headings:

Sell Price (from Contract)	This field will display the description of the item and ***Sell Price*** from the Worksheet. **Note:** This heading is not the list price.
Cost Price	This field will display the ***Cost*** price of each item from the Worksheet in ***Vehicle Advisor*** Sales Manager Review. This field will display the ***Cost*** price of each item from Vehicle Inventory in ***Vehicle Sale Process.*** **Note:** The ***Cost*** from the Vehicle Inventory will be used if it is available and the deal was updated from Inventory.
Profit	This field will display the profit amount per category or individually for Other Charges. They can be individually setup in ***4449 - Other Worksheet Charges Maint*** to be included code by code in Gross Profit calculations. The profit amount is ***Sell*** price minus ***Cost*** price. **Note:** This field will display N/A if the equivalent codes in ***4447 - Worksheet Gross Profit Setup*** are setup to not be included in the Gross Profit Report.
Profit%	This field will display the Profit percentage % calculated as a percentage % of the Profit to the ***Cost*** price. **Note**: This field will not display if the equivalent ***4447 - Worksheet Gross Profit Setup*** is set to not be included in the Gross Profit Report.
Reference	This field will display the Reference number relating to wherever the item details came from if it exists or is required. **Note:** This displays Factory Claim/Factory Rebate references.

Note: *All GP Details are run in TAX Exclusive mode.*

<u>**Individual sections:**</u>

Vehicle Price	This field will display the Base Vehicle Price and Cost from ***0626 - New Vehicle Model Maintenance***. **Note:** The cost may include the Holdback amount if it is setup to not show separately but is to be included in the Gross Profit Report. Refer to executable ***4447 - Worksheet Gross Profit Setup***.
Factory Claim	This field will display the Factory claim amounts and will print for ***New*** vehicles only based on ***0626 - New Vehicle Model Maintenance*** Fleet Rebate information. **Note:** This field does not have a sell price; it is a rebate from the factory and is included as a negative cost only and a 100% profit calculation.
Discount/Miscellaneous	This field will display the (DI) discount line in ***4439 Worksheet Category Description*** setup screen. The actual amount comes straight from the Worksheet and will have a selling price and no cost. **Note:** This field can be used as a *discount* or *surcharge* by entering a negative or positive amount on the Worksheet.
Repair Order Amounts	This field will display open Repair Orders. Costs are shown as ***RO XXXXX remaining balance.*** The amount displayed is calculated by subtracting any *Dealer Accessory Code* additions on each Repair Order; any costs with jobs not associated with adding *Dealer Accessories* will be included in this field. Each Repair Order job menu price from the ***3625 - Service Operations*** is purely a cost on the vehicle and will show a ***Sell*** Price amount of zero when merged from Inventory using the Update option in ***Vehicle Sale Process.*** **Note:** Once the Repair Order is closed, the actual costing amounts are added to the vehicle so these detail lines will no longer show on the report.
Vehicle Colours	This field will display ***4154 - New Vehicle Colour Codes*** amounts from the Worksheet or Inventory.

	Note: This is for ***New*** vehicles only.
Vehicle Factory Options	This field will display ***4156 - Factory Option Codes Maint*** amounts from the Worksheet or Inventory. **Note:** This is for ***New*** vehicles only.
Dealer Accessories & Aftermarket	This field will display the costing of each job on the Repair Order that has a Dealer Accessory or Aftermarket item attached. **Note:** Any Dealer accessory or Aftermarket accessory from the Worksheet or Inventory will print here. If the accessory is being added by a currently open repair order the estimated cost of that item will be based on the job by job repair order calculations explained in the repair order section above and the description will be prefixed with an * asterisk.
Other Charges/Dealer Delivery	This field will display any other charges from the worksheet. **Note:** This section prints differently to all the other sections of the ***Gross Profit Report***. The total *summary* line for the category does not include the Profit & Profit%; but prints each individual line instead. This is because each individual other charge code can be setup to be included in ***4449 - Other Worksheet Charges Maint.***
Registration Fees	This field will display Registration and CTP from ***4451 Registration Charges Maint*** and the ***4443 Additional Rego Charges Maint*** setup. **Note:** Details will only print here based on the selected Worksheet.
Stamp Duty	This field will display ***4442 - Stamp Duty Maintenance***. **Note:** Details will only print here based on the selected Worksheet.
Total Sell Price	This field will display the *Subtotal* of total selling price before bonuses, holdbacks and trade-ins are included.
Holdback	This field will display for ***New*** vehicles only; the Holdback amount will print here as purely a Profit figure with no sell & cost amounts. **Note:** If Holdback is setup to print separately in ***4447 - Worksheet Gross Profit Setup*** even if Holdback is $0.00 it will still print as $0.00 if the ***4447 - Worksheet Gross Profit Setup*** is set to ***Yes***.
Bonus	This field will display any bonus amounts setup in ***4163 Factory Bonus Maintenance*** that is added to the worksheet. This amount will print here as purely a Profit figure with no sell & cost price amounts.
Trade Ins	This field will display all 3 types of ***Trade Appraisals*** that can be added to a worksheet. Ie. Quick, Summary and Complete. **Note:** The reference number column will show ***OA Applied*** if an over allowance is applied to the trade-in or ***UA Applied*** if an under allowance is applied to the trade-in.
Total Sales Gross	This field will display the subtotal of *Total Sales Gross.* **Note:** This does not include cost pack.
Cost Pack	This field will display for ***New*** and **Used** vehicles. Printing an Inventory version of the report in ***Vehicle Sale Process*** of a ***New*** Vehicle Deal will detail the cost pack amount from Vehicle Inventory ***4006 - New Vehicle Maintenance.*** Printing an Inventory version of the report in ***Vehicle Sale Process*** of a ***Used*** Vehicle Deal will detail the cost pack amount from Vehicle Inventory ***4008 - Used Vehicle Maintenance.*** **Note:** If the cost pack is not on the inventory for ***New*** vehicles or you are printing a Deal Version of the report it will use the cost pack amount from the Pricing screen of ***0626 - New Vehicle Maintenance*** Field # 4. Pack.
Total Gross	This field will display the total Gross Profit.

Note: *All GP Details are run in TAX Exclusive mode.*

Select Ok from the ***Vehicle Sale Process*** screen and Exit as per existing functionality.

Note: If you are printing a multiple vehicle deal the report will include Vehicle 1 of 2, and Vehicle 2 of 2 calculations.

Benefits

Sales Managers can track the margin (sell - cost) accurately.

Activation Key

ERAnet VEHICLE ADVISOR

