

BMS Evolution (Aardvark) Release Notes

Please read the attached notes carefully BEFORE having your system upgraded - it is NOT possible to revert back to the old version once the upgrade has been done.

The list below is a summary of the changes made to the Evolution system. There may also be other minor changes not listed below. Should you have any queries regarding any of the changes to the software, please contact the support team who will be happy to advise you.

New User Manuals are currently being produced and will shortly be available for download from our website.

Important	
Printing	One of Each Printing - No longer available. Automatic printing of Job Card and Parts List to separate Printers handled differently. Adobe Reader required on ALL PC's. Test that Adobe Reader can print to all printers as there are incompatibilities with some printers. Letterhead fonts require submitting to Support Desk
Standard Letters	Content of Documents such as Collection Note/Satisfaction Note need defining.

CAPS

This latest BMS release is fully CAPS II compliant.

Printing

PDF Documents

All printing is now carried out using PDF format. Typically documents will be printed on screen using Adobe Reader. It is then possible for the user to print the document on a network or windows printer. In addition, if configured, Adobe Reader can then be used to email your documents. For further details regarding Adobe Reader, please visit their web site <http://get.adobe.com/uk/reader/>.

It would be helpful if you could load the latest version of Adobe Reader onto each of your PC's, prior to the upgrade and test that Adobe Reader can print to all printers as there are incompatibilities with some printers. **If you are unsure what this means then give us a call.**

Parts Lists

We have improved the way we print Job Parts Lists. This is now handled by the Parts Queue option which the parts department may then access to action/print the Parts List.

Document Style

In order to improve the appearance all correspondence documents are now presented in Times Roman font and not the old 'typewriter font'. Some text may now be up-shifted or downshifted depending on your preference.

Letter Heads

We have often been asked to produce a simple text based document header for documents. This has now been done. Existing Pre Printed Letterheads may still be used or we can produce full colour letter heads that will print to PDF or your windows printer.

Document and Image storing

Evolution

If you are running Evolution on a server, and you are currently storing documents against jobs, you may have experienced capacity problems. We now offer EvoStore, which allows you to store documents on a dedicated fileservers separate from your main fileservers. If you have a multi-branch installation, EvoStore can speed things up by giving you local file storage at each site.

Evolution Online

If you using our Evolution Online service, you can use EvoStore to allow even large documents to be stored on a fileservers on your local site. Unlike the normal Evolution Online service for saving documents against jobs, EvoStore gives you a full 'My Computer' style view of the job folder so you can use it just like any other Windows folder. There is no file size limit and access to the files is instant.

General

Copies of documents produced by Evolution (e.g. Job Cards, Estimates, Orders etc) may now be stored against jobs - **please advise BMS if you require this function enabling.**

Ability Add Files to Employees, Suppliers and Sales Accounts (similar functionality to adding files to Jobs which already exists).

General Appearance

Icons have been changed to improve consistency. All the icons remain in the same location on screen; however the pictures and style of them have changed.

Estimating / Invoicing

Fix Priced Labour

New Estimating Screen type available to enable fixed price charge but also allocate hours to the workshop. Fixed priced labour will be shown on Summary Screen (Estimating and Invoicing).

Job Cards

Total MET, Panel and Paint hours printed on Job Card (provided hours are normally shown). Ability to have a "Sign Off" facility on Job Cards - **please advise BMS if this function is required.**

Job Enquiry

Job Enquiry Screen amended to show when vehicle is written off and the screen Layout amended to incorporate new fields e.g. Estimator name.

Summary Screen

Recovery Rate added to Job Summary Screen (Estimating and Invoicing).

The Recovery Rate is calculated by dividing the Labour Figure by the Workshop Allocated Hours instead of the Agreed Hours.

Effective Invoice Rate added to Job Summary Screen (Estimating and Invoicing). This is calculated by dividing the Labour Figure by the Agreed Hours. Please note that Fixed Priced Labour may make this figure seem distorted.

Ability to set Labour Rate to zero added to Job Summary Screen (Estimating and Invoicing).

Override Invoice Address

Override Delivery Address in invoicing now has R function which enables replacement of address. Satisfies Help Hire requirements.

Invoice Tray

Invoice tray shows S next to special invoices.

Special Invoice

Ability to Import Stock items into a Special Invoice. Only relevant for users that operate the Stock Control Module, this new facility enables the user to import a stock item into a special invoice. The stock level for that item is reduced and the system can then produce an invoice without the need to create a Job.

Payment Details

Cash Payment Type available in Payment Details Screen and Special Invoices/Credits, which allows COD Posting to different Nominal Ledger Accounts in sage, dependant on payment type - **please advise BMS if you require this function enabling.**

Parts / Stock

Parts Orders

Select/Deselect all facility in parts and sublet ordering screens.

Parts Lists

We have improved the way we print Job Parts Lists. This is now handled by the Parts Queue option which the parts department may then access to action/print the Parts List. We are also now able to show Sublets on Parts list (**if requested**).

Purchase Ledger

Supplier Maintenance routine now allows search by T/P (Sage) Code (only relevant when the Sage Purchase Ledger Link is enabled).

Supplier T/P (Sage) Code now prints on supplier list (if PL Link enabled).

Sublets now fully supported in Sage Purchase Ledger Link.

Ability to add bin number when booking parts in. Shown in Parts Control Enquiry screen.

Reports

Employee Reports

Recovery Rate added to Claimed Time Report.

Employee on site report now shows if employee is LOCKED.

Administration Reports

New Format E for Vehicle on Site Report. Grouped by department. E.g. awaiting Strip, Panel etc.

New format I for Vehicle Due Out report to include Job Value.

Revision to Completed Jobs Not Invoiced Report so it now shows Labour figure as well as Total.

Vehicles with booking in dates or those marked on site are excluded from the Lost Business Report

Job Analysis Reports

WIP Reports have new selection criteria

Additions to WIP reports to allow Parts Analysis.

New Labour Analysis Report.

Claimed hours added to the job costing report.

WIP Reports have new selection criteria

- Use Parts Delivered flag - parts prices only included if set to Y.
- Use Sublet Delivered flag - sublet prices only included if set to Y.
- Include paint when task is Started or Completed (setting to N will always include it, if present).

Job Source Reports

New Progress Report.

Manufacturer Reports

New Volkswagen composite report

CSV (Excel) Reports

New Excel Extract available for contact details by Job Source Code.

New Excel Extract available for marketing purposes.

Day End / Sage

T/P Code (Sage Account Code - where specified) shown on the Payment Details and Produce Invoices Screen.

Supplier T/P (Sage) code extended to 25 Characters. This field is also used to record a default Nominal Ledger code and this should be considered when entering the information as the 25 characters specified is for **both** the account code and the nominal ledger code.

Day End now advises of any invoices that it fails to process and why. E.g. Job Not Completed, Courtesy New Reference Posting type available in Sage Link enabling different posting references for Excess and Insurance Invoices.

Diary HR

Employee Calendars

Employee Calendars now have added field for hours worked, linking to booking system. Previously the booking system calculated the available hours based on times entered in the General Availability section of the Employee Calendar. This caused a problem for employees that MAY work shifts and therefore needed to be able to clock on over a wide range of start and end times, but would only ever be on site for a fixed number of hours. This facility now enables us to accommodate this.

Employee Maintenance

Employee Maintenance screen now shows leaving dates and group information when listing employees.

Booking System

Booking System can now calculate based on Estimated OR Workshop hours.

The Booking system can now be locked so averages do not drop in quiet periods. The booking system previously booked jobs based on average repair times, and resources. Therefore if the averages dropped during quiet periods, the booking system would only book to the new lower levels. We have now added a lock facility so that this does not happen.

In the Booking System, if hours are locked (as explained above) in Show Historical Job Stats, then these are shown in Red. Booking system now shows date in red if date closed.

New Column on Search screen to indicate if job has been booked in.

SMS Text Messages

We now have the ability to send SMS text messages when specific tasks are completed. You can now also manual SMS Text Messages (audit trail available). We have added the ability to store SMS numbers to a job during Job Creation.

Courtesy Cars

You are now able to delete Service Records for Courtesy Car in maintain vehicle service.

Standard Letters

More user control over Standard Letters/Special Documents. Document production also revised and grouped onto one menu - **Please Note: it will be necessary to define content of documents such as Collection/Satisfaction Notes immediately after the upgrade has been done.**
Ability to define content of many standard letters using new Maintenance facility.

Grouping Software

Grouping software now available to enable control of external access to BMS and jobs (useful for dealerships).

If you have any queries with any of the above then please do not hesitate to call us.