



## **Release Notes**

**Spurs Release**  
Spring 2006

# Business Office

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**Inventory exception reports** – Five new exception reports have been added to the Vehicle Information menu. To see these reports, take option **3=Inventory Exceptions** from the Vehicle Information menu.

1. Invalid VIN # – Displays or prints all of the vehicles in an inventory status with invalid VINs. Note: customer owned vehicles with invalid VINs are not included in this report.
2. Missing Stock # – Displays or prints all of the vehicles in an inventory status with a blank stock number. Note: customer owned vehicles with blank stock numbers are not included in this report.
3. Missing Date in Inventory – Displays or prints all of the vehicles in an inventory status that have no date in inventory. Note: customer owned vehicles with no date in inventory are not included in this report.
4. Vehicle is Not in G/L – Displays or prints all of the vehicles in an inventory status that have no cost in the general ledger inventory account. The system uses the vehicle stock number and the inventory account on the vehicle information screen to check for cost. Note: customer owned vehicles without cost in GL are not included in this report.
5. Duplicate Stock # – Displays or prints all of the vehicles in an inventory status with duplicate stock numbers. Both vehicles with the same stock number are displayed and can be distinguished by the VIN. Note: customer owned vehicles with duplicate stock numbers are not included in this report.

**Accessories on car deals** – A new feature, function **38=Accessories**, has been added to option **1=Deals** that lets you put accessories on a car deal. This function has the following features:

1. Accessories are added to the cost of the vehicle when they are added to a deal.
2. The selling price of the vehicle must be changed manually to maintain your front end gross.
3. Accessories must be defined by the ARKONA F&I Forms department in the Business Office Application Environment to ensure that the F&I forms will print correctly when accessories are included on a deal.
4. Accessories can be set to be automatically included on car deals.
5. Accessories can be added to the MSRP on a lease when they are selected. When added to the MSRP, they increase the residual value of the vehicle.

6. Use function **38=Accessories** to select additional accessories and change the retail amounts.
7. The cost of the accessories can be changed using option **1=Accessories Cost** on the **70=Recap** screen.
8. Accessories must be capitalized on a lease and cannot be paid up front.
9. Accessories are itemized on the deal cap sheet.

**Irregular payments** – A new payment option has been added to function **27=Payment Options** in the Deal Screen to compute irregular payments. Irregular payments occur when the first X number of payments are one amount and the remaining payments are a different amount. For example, the first 6 payments are \$100.00 and the last 30 payments are \$532.22 on a 36 month contract. Unpaid interest on the irregular payments is added to the principal balance before computing the remaining payments. To work a contract with irregular payments, take the following steps:

1. Start a deal and get the regular payment.
2. Use function **27=Payment Options** and key in the irregular payment amount in the Other Payment Amount field.
3. Put the letter I on the Frequency\* line.
4. Key in the number of irregular payments on the contract on the Number of Payments line and press [ENTER] to save.
5. The code IREG displays on the Term line of the main Deal Screen and you can display the payment summary with function **28=Disclosure**.

**Electronic vehicle registration (EVR) integration with triVIN** – ARKONA is now integrated with triVIN electronic vehicle registration and this feature can be used by ARKONA customers in states where triVIN's service is available. With EVR, you can key in a list of stock numbers and download a file to your local PC. This file can then be transferred to triVIN who will process the information and register the vehicles with your state electronically.

There is a little setup that must be done and FTP server software must be installed on the PC you are going to send the file from to triVIN. Please contact ARKONA Customer Support for assistance getting this set up.

To create a file for transmission, you can take the following steps:

1. Take option **35=Report to Outside Parties** from the Business Office menu and take option **1=Select** by Electronic Vehicle Registration.
2. Key in the stock number you want to add to the file and press [FIELD EXIT] [ENTER].
3. Once the stock number is in the list, use function **F10=Download** to transfer the file to your local PC.

- Note: With triVIN, each stock number must be downloaded to the local PC individually.
  - The files have the deal stock number as part of the file name.
4. The file is then ready for processing by triVIN. Please contact triVIN for assistance processing the file.

**Missouri state electronic vehicle registration** – Integration with the state of Missouri for their electronic vehicle registration is available. With this simple application, you key in the stock numbers of the vehicles you want to report and download the file to your desk top PC. From there the file is transferred to the state of Missouri via an upload to their web site.

**Louisiana state electronic vehicle registration with Auto Title Express** – Integration with Auto Title Express for their electronic vehicle registration is available in the state of Louisiana. With this simple application, you key in the stock numbers of the vehicles you want to report and download the file to your desk top PC. From there the file is transferred to the state through Auto Title Express.

**Chargebacks for payroll import** – A new prompt has been added to the entry screen in option **32=Chargebacks/Commissions** which lets you specify whether the entry applies to new or used commissions. This feature facilitates payroll entry using the commissions import feature.

**F&I forms change log** – A new log has been created to track changes to the F&I forms layout. The user ID, date, and time the change occurred are stored in the log. Details of which lines changed are available by drilling down. To see the change log, take option **2=Setup Forms** from the Document Generation menu and take option **5=Log** by the form ID.

**F&I forms delete log** – A new log has been created to track which F&I forms are deleted from the system. The form ID, date, time, and user ID are tracked in the log. To see the log, take option **2=Setup Forms** from the Document Generation menu and use function **F9=Delete Log**.

**New tax credit formulas for Washington leases** – Four new tax credit formula options for Washington leases has been added to the lease source setup screen. This option computes the sales tax credit by dividing the product of the trade allowance and the tax rate by the lease term and reducing the monthly sales tax by the result. To see the lease tax credit options take option **50=Application Environment** from the Business Office menu and take option **1=Select** by Lease Sources. Take option **2=Change** by a

lease source and press [ENTER] to see the second screen. Use function F4 on the Trade Tax Credit Method\* field.

**Enhanced Business Office Analysis** – The Business Office Analysis report has been enhanced to provide a summary level by product type for credit insurance, GAP insurance, service contracts, and aftermarket options.

For example, when you drill down into the service contract line in Business Office Analysis, you will see a summary of the service contracts sold by the service contract company. You can drill down into each company to get a detail of the deals on which a service contract was sold.

**Lien holder information added to lease bank setup** – A new area has been added to the lease source information in the Business Office Application Environment to hold the lien holder name and address information. This is used for lease companies that have a different lien address than office address and both of the addresses must print on the bank forms.

To add lien holder information to a lease source, an authorized user can take the following steps:

1. Take option **50=Application Environment** from the Business Office menu and take option **1=Select** by Leasing Sources.
2. Take option **2=Change** by the lease source and press [ENTER] to see the second screen.
3. Fill in the lien holder name and address information and press [ENTER] to save.

**Interest free sales tax option** – A new initial value has been added to the Business Office Preferences to provide the option to exclude sales tax from interest. This feature only applies to the buy/here-pay/here market in certain states. When this initial value is set, a new option appears in the **27=Payment Options** window accessed from the main Deal Screen. When sales tax is excluded from interest, the monthly payment is computed on the amount financed without the state sales tax (from line 1 in the tax group). That payment is then used in connection with the amount financed including the sales tax to produce an effective APR that is a little lower than the interest rate on the contract. The sales tax is then divided by the term of the contract and added to the monthly payment to produce the contract payment.

**Salesperson license number field** – A field has been added to the salesperson profile for the state license number. This field is also available to be printed on F&I forms. To see the new field, take option **50=Application Environment** from the Business Office menu and take option **1=Select** by Salespersons. Take option **2=Change** by a salesperson and the license number field is right beneath the employee number.

**Option to print barcode label from trade screen** – Function **F19=Barcode** has been added to the second screen of function **23=Trade Entry** to make it possible to print a barcode label for the trade from the Deal Screen.

**“Position to” in Sales Analysis by Model Code** – A new feature has been added to the Sales Analysis by Model Code to allow you to position to a specific model code in a long list. Key in the first few characters of the model code you want and the display is repositioned with the requested model at the top of the list. To see this feature, take option **10=Sales Analysis** from the Business Office menu and take option **1=Select** by Sales Analysis by Model Code. Key in your selection criteria and display the report. The “Position to” field is just above the list of model codes.

# Customer Relationship Management

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**New letter generating software** – The existing CRM letter generating software has been replaced with a new version that is easier to set up and maintain and uses all of the functionality of Microsoft Word 2003® mail merge features. This version uses a Windows program to select the data source and print the letters using Microsoft Word®. Microsoft Office 2003® must be installed on the PC that will print letters.

**Prospect Summary Report** – A new management report has been added to provide a quick summary on paper of the active prospects for each salesperson. The information is sorted by salesperson with the most recent prospects at the top of each salesperson's list. It also includes prospect name, source, the vehicle they are interested in and its stock number, their trade information, whether they received a demo, their next appointment date, and next contact date, along with any notes made when the prospect was registered. To print this report, take option **24=Reports** from the Customer Relationship Management menu and take option **1=Select** by Prospect Summary Report.

**Daily Work Plan Report** – A new report has been added to print the daily work plan for salespersons. The report includes a list of all of their prospects and customers for which a follow up activity is waiting in the salespersons Daily Work Plan.

The Daily Work Plan Report has the following features:

1. It prints in the format of the Salesperson Call Sheet.
2. Key in a date in the future to include upcoming follow up activities on the report.
3. You can select which salesperson or BDC rep you want to print for, print for a selected list of salespersons, or all salespersons.
4. There is an option to print the customer history on the report. Use this to print previous contact history.
5. All of the current contact activities that need to be completed are listed on the report.
6. The report includes customers that are not active prospects but still need follow up activities completed.

**Missed showroom appointment follow up activity** – The missed showroom appointment event in the Contact Activity Scheduler is available. When the follow up activity is defined for a missed showroom appointment, the system creates the follow up activity when a prospect is flagged as a no-show in Showroom Management.

To activate this event, take option **50=Application Environment** from the Customer Relationship Management menu and take option **1=Select** by Contact Activity Schedule. Take option **2=Change** by Missed Showroom Appointment, set Active = Y, and use function **F6=Add** to define the follow up activity.

**Vehicle description maintenance** – A new tool has been added to the Customer Relationship Management application that lets you clean up vehicle descriptions. This program displays all of the make, model, and body descriptions for all of the vehicles in your database along with a count of how many there are of each kind.

For example, you may find that you have 25 Acura Integra 4-DR vehicles and 3 Acura Integra 4D. You can select the Acura Integra 4D line, change the body description to 4DR and when you press [ENTER], all 3 vehicles will be updated to match the other 25.

To use this feature, take the following steps:

1. Take option **20=Data Tools** from the Customer Relationship Management menu and take option **1=Select** by Vehicle Description Maintenance.
2. Position to the make of the vehicle you want to review.
3. Take option **1=Select** by a group of descriptions you want to modify and press [ENTER] to display the make, model, and body information.
4. Make the desired changes and press [ENTER] to save.

**Changes to the Match/Merge Names program** – The Match/Merge Names program that is used to clean up duplicate records has been added to option **20=Data Tools** on the Customer Relationship Management menu. The following additional changes have been incorporated into the application:

1. The five ways of searching for duplicates have been placed in different menu options. You can search for duplicates by:
  - a. Name
  - b. Home Phone
  - c. Business Phone
  - d. Street Address
  - e. Street Address & Zip Code
2. A Position To function was added at the top of the Match/Merge screen to let you pick up where you left off the last time you were working on duplicates.
3. You now use option **R=Replace Field** to copy information from the duplicate record to the master.

As always, function **F8=Replace** copies all of the history from the duplicate customer record over to the master and deletes the duplicate.

**Add mail merge field for customer steward.** – A new field has been added to the mail merge field index for customer steward. The field name is {CZSTEWARD}. This means you can print the salesperson and/or the customer steward on your follow up letters.

**Option to print follow-up activities on the salesperson call sheet** – An option has been added to the selection screen when printing the Salesperson Call Sheet to print the follow-up activities with the prospect information. To print the activities on the call sheet, take option **24=Reports** from the Customer Relationship Management menu and take option **1=Select** by Salesperson Call Sheet. Set Include Activities = Y.

**New call sheets for appointments in Daily Work Plan Analysis** – A new call sheet report has been added to the Daily Work Plan Analysis for Appointments and Missed Appointments. This report makes it easy to follow up on prospect appointments and missed appointments. To print these reports, take the following steps:

1. Take option **11=Daily Work Plan Analysis** from the Customer Relationship Management menu.
2. Take option 1 – 4 to drill down on the Appointments line or the Appointments Missed line for a selected column.
3. Use function **F18=Print Call Sheet** to print the regular Salesperson Call Sheet, but only for the prospects on the appointment list.

# Data Extraction

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**Customer selection for data extraction** – Several new extraction programs have been added to the Data Extraction menu for authorized users. These programs let you select customers and output customer name and address to 30-label sheets, a printed list, or ftp a file that includes vehicle information to your local PC. The customer selection programs fall into three main categories:

1. Service Customers – This program lets you select customers by the following criteria:
  - a. Last service visit date
  - b. Number of visits
  - c. Customer pay amount
  - d. Vehicle description
  - e. Service feedback comments
2. Car Deal Customers – This program lets you select car deal customers in a way similar to the deal selection in Sales Analysis on the Business Office menu: sale date range, sale type, deal status, and vehicle description.
3. Select Customers – Lets you select customer by area code, zip code, or the description of the vehicle they own.

To use this feature, you must be authorized to Customer Selection in the Data Extraction application security. This authorization must be granted by the dealership ARKONA security officer in User Security on the System Environment menu.

Once authorized, you can use this feature by taking the following steps:

1. Get to the Data Extraction application menu and take option **1=Select** by Data Extraction Selection to display the Data Extraction Selection menu.
2. Take option **1=Select** by Customer Selection and then take option **1=Select** by the type of extraction you want to run.
3. Set your selection criteria and press [ENTER] to run the selection. Your results are displayed on the screen. Note: The Distinct option tells the system to only select a customer record one time if they are found in the selection more than once.
4. Use function **F10=Select** to Display your options and take option **1=Select** by the by the output option you want.
5. Key in the printer name or file name and press [ENTER] to create the output.

**Parts customer extraction** – A new data extraction has been added to the Data Extraction menu to pull your parts customers to a .csv file on your local PC. The file includes customer number, name, address, tax ID, wholesale comp info, the last 24 months' sales and returns, plus the last 12 months' total sales. To run the data extraction, an authorized user can take option **1=Data Extraction Selection** from the Data Extraction menu and take option **1=Select** by Parts Customers. Key in a file name, the IP address of your local PC, the ftp user ID and password for the ftp server and press [ENTER] to run the extraction. Contact ARKONA Customer Support for assistance setting up an ftp server on your PC.

# General Ledger

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**New security option for bank reconciliation** – Function **F11=Complete with Difference** has been tied to security in the General Ledger. With the release, all users will be set to N for this function. To authorize a user to complete a bank reconciliation with a difference, the dealership ARKONA security officer can take the following steps:

1. Take option **7=User Security** from the System Environment menu and position to the user ID.
2. Take option **2=Change** by the user ID and take option **1=Authorize** by General Ledger.
3. Page down and set Authorize Bank Account Reconciliation – Complete with Difference = Y.

**New tax preference for dirty core returns** – A new line has been added to the General Ledger Tax Group screen to designate that dirty core returns are non-taxable. This applies to states where the refund for a dirty core return does not include the sales tax charged on the core when it was sold. To set this prompt, take option **50=Application Environment** from the General Ledger menu and take option **1=Select** by Tax Groups. Take option **2=Change** by your tax group and you will see the new line for Core Return.

**Electronic submission of Saab factory financial statement** – It is now possible to send the Saab factory financial statement to your local PC so it can be uploaded to the Saab web site.

**Enhancements to split account entries in Write Checks** – When writing a check and charging the expenses to multiple accounts, you currently use function **F5=Split**. The following enhancements have been made to function **F5=Split** when you are writing a check and expensing it to multiple accounts:

1. You can change entries that have been added to the split account check detail with option **2=Change**. This option pulls the check detail line back down to the edit line so you can make changes. Press [ENTER] to save the change.
2. You can delete incorrect entries in the split account check detail with option **4=Delete**.
3. You can remove all entries from the split account check detail with function **F9=Clear**.

**Enhancements to split account entries on Other Receipts** – When generating a receipt in option **22=Receipt Cash** in Other Receipts, you use function **F5=Split** to credit multiple accounts. The same **F5=Split** functionality described in the previous entry in these release notes also applies to receipting cash.

**Enhancements to split account entries on Petty Cash** – When generating a petty cash disbursement in option **22=Receipt Cash** in Petty Cash, you use function **F5=Split** to charge multiple accounts. The same **F5=Split** functionality described in the previous entry in these release notes also applies to petty cash.

**Enhancements to split account entries on Hand Written Checks** – When generating a hand written check in option **25=Hand Written Checks**, you use function **F5=Split** to charge multiple accounts. The same **F5=Split** functionality described in the previous entry in these release notes also applies to hand written checks.

**Option to add notes to posted transactions** – A new feature has been added to function **31=Document/Control Inquiry** that lets an authorized user add notes to posted transactions. The transactions with notes are highlighted in yellow in Document Inquiry. The notes print on the Detail Controlled Accounts reports, the Accounts Receivable and Accounts Payable reports, and the Account Comparison reports printed through option **34=Audit Reports**.

To authorize a user to add notes, the dealership ARKONA security officer can take option **7=User Security** from the System Environment menu and take option **2=Change** by the user ID. Take option **1=Authorize** by General Ledger and page down to the bottom. Set Authorize to Write Transaction Notes = Y. An authorized user can change or delete their own notes, but they cannot change or delete any other users' notes.

To add notes to a posted transaction, an authorized user can take the following steps:

1. Take option **31=Document/Control Inquiry** from the General Ledger menu and take option **1=Select** by Document Inquiry.
2. Position to the document number and take option **9=Notes** by the transaction with the account number you want to note to display the Notes window.
3. Use function **F6=Add** to display the notes window.
4. Key in your notes and press [ENTER] to save.
5. Use option **2=Change** by an existing note to modify it, or option **4=Delete** to remove it.

# Parts Inventory & Invoicing

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**Minimum gross profit % threshold added to pricing strategies** – A new field has been added to the pricing strategy setup that lets you designate the minimum gross profit % you want to allow for the pricing strategy. This feature is designed for list- or trade-based pricing strategies to maintain your GP% threshold. For example, suppose you have a part with a cost of \$100 and an MSRP of \$125. If you sell that part at your pricing strategy of 90% of List (\$112.50), your GP% on that sale is 11% (\$12.50/\$112.50). With this new feature, you can add a minimum GP% of 15% to your 90% of List pricing strategy and the system will automatically price the part at \$117.60 to hold your 15% GP%. When the system overrides the pricing strategy to maintain your gross, you can see the override indicator ( \*MIN GP%\* )when you take option **2=Change** by the part.

**Parts customer extraction** – A new data extraction has been added to the Data Extraction menu to pull your parts customers to a .csv file on your local PC. The file includes customer number, name, address, tax ID, wholesale comp info, the last 24 months' sales and returns, plus the last 12 months' total sales. To run the data extraction, and authorized user can take option **1=Data Extraction Selection** from the Data Extraction menu and take option **1=Select** by Parts Customers. Key in a file name, the IP address of your local PC, the ftp user ID and password for the ftp server and press [ENTER] to run the extraction. Contact ARKONA Customer Support for assistance setting up an ftp server on your PC.

**New Ford parts order download** – A new method of transmitting stock orders to Ford has been added. This method creates an .xml file on your local PC which can then be uploaded to the Ford website. This feature eliminates the need for Macro Express to "key" the stock order into the Ford web site and the 99 line limitation. Contact ARKONA Customer Support for assistance converting to the new download.

**Preference for picking ticket printer selection** – A new preference has been added to Parts Department Application Environment Initial Values that lets you interactively select which printer a picking ticket is printed to. When this preference is selected, function **56=Print Picking Ticket** in Parts Transactions will let the user override the printer the picking ticket will go to.

**Acura wholesale comp report** – A new report and download option for Acura wholesale comp parts has been added to the reports menu. To run this report and download a file to your PC, take option **24=Reports** from the Parts Inventory & Invoicing

menu and page down. Take option **1=Select** by Wholesale Compensation. Fill in the screen and press [ENTER] to download. Some preliminary setup is required for this to work. Please contact ARKONA Customer Support for assistance.

**Deleting pricing strategies no longer allowed** – You are no longer allowed to delete a pricing strategy from the list of pricing strategies available in the Preferences Area of the Parts Department Application Environment. This is to prevent the accidental removal of pricing strategies that are in use and consequential parts pricing errors.

**Yellow pad parts not included in physical inventory variance for partial inventories** – When physical inventory count sheets are created for a subset of bins and a yellow pad part is added to the physical inventory that is not on the count sheets, the system will not compute the variance or include the variance for that yellow pad part in the inventory variance dollar total.

**Refresh on hand count when updating entered count sheets** – The current on hand count for a part will be retrieved when a change is made to a count sheet that has been entered. For example, if you key in the counts on a count sheet and press [ENTER] or use function **F9=Next Sheet** to save the counts then later call the count sheet back up, when you change the count for one of the parts, the system will retrieve the current on hand count for that part and recompute the variance against the updated count you entered.

**Store a list of all parts when deleting an invoice** – When a counterperson retrieves an invoice from the Cashier screen and uses function **F14=Delete** to delete the invoice, the invoice is stored in history as a VOIDED INVOICE. When the invoice is displayed, all parts removed will be listed along with the user ID and counterperson ID used to delete the invoice.

**New password prompt** – When a counterperson enters Parts Transactions, he will key in his counterperson password on a separate screen before the Parts Transaction screen displays.

**New window for Gross Profit display** – Function **80=Gross Profit** now displays a window with the same information that was previously display on the Parts Transactions screen.

**Changes to parts billing with relation to selling below cost** – Several changes have been made in relation to billing functionality:

1. Security to sell below cost:
  - a. If a counterperson does not have rights to sell a part below cost, the cost of a part may not be reduced below the factory cost.
  - b. If a counterperson does have the right to sell a part below cost, a new warning is displayed if the cost entered is below factory cost with the option to use function **F10=Accept** to bypass the warning.
2. Test on selling below cost moved to test against cost in the parts master.
  - a. Previously the test to prevent users from selling below cost was to check the net price of the part against the cost entered on the screen. The test has been change to check the net price of the part against the cost of the part on the parts master.
3. Net price displays on the emergency purchase screen.

**Security option to change cost in 10=Parts in Inventory** – A new security option to change cost has been added to the Parts Department area of User Security on the System Environment menu. A user must be authorized to change cost to use function **12=Change Cost** in menu option **10=Parts in Inventory**. To change this security preference, the dealership ARKONA security officer can take option **7=User Security** from the System Environment menu, select the user, take option **1=Authorize** by Parts Department and scroll to the second screen. Set Authorize to Change Cost = Y.

This security option can also prevent a user from changing cost in **11=Stock Orders** when receiving parts that are not on a stock order.

**Change to automatic stocking group move** – The program that moves parts from one stocking group to another based on the manufacturer's promo code (for Hyundai, BMW, and Volvo only) has been modified to provide for a "return to" stocking group for when the promo code is removed by the manufacturer. This way when the manufacturer indicates that a part is no longer on promo, the part can be automatically "returned to" a different stocking group.

To add the "return to" stocking group for a promo code, take the following steps (on Hyundai or Volvo only):

1. Take option **50=Application Environment** from the Parts Inventory & Invoicing menu and take option **1=Select** by Manufacturers.
2. Take option **2=Change** by the manufacturer code and press [ENTER] twice to see the Manufacturer Code Cross Reference table.
3. Take option **2=Change** by a promo code and key in the stocking group code in the Return to Stocking Group field.

The program to change the stocking groups runs when a promo code is manually changed or changed through the process of the monthly parts price update.

**Restocking Charge** – A new feature has been added to the Parts Invoicing screen that lets you bill a restocking charge on a parts counter ticket. The restocking charge is defined in the Parts Department Application Environment Restocking Charge area. It can be a percent of parts, a percent up to a dollar max, or a flat dollar amount. You can set it to automatically include on every return, or use the new function **33=Restocking Charge** to add it at your discretion. If the charge is automatically included on every return, a counterperson must be authorized to remove it in Parts Department Application Environment Counterpersons area.

**Parts fees** – A new feature has been added to the Parts Invoicing screen that lets you charge a set fee on all part invoices and repair orders. The fees are defined in the Parts Department Application Environment Fees area. The fee can be a percent of parts, a percent up to a dollar max, or a flat dollar amount. You can set it to automatically include on every invoice, and set the fee to be subject to sales tax if desired. A new function **34=Fees** has been added to select the fee if it is not automatically included on the invoice. If a counterperson is authorized, a fee may be removed from the invoice with line option **4=Delete**. There is a new security option in the Counterperson area of the Parts Department Application Environment that controls fees security.

**Parts discounts** – A new feature has been added to the Parts Invoicing screen that lets you discount a counter ticket by a predetermined amount. The discounts can be defined in the Parts Department Application Environment Discounts area. A discount can be percent of parts, a percent up to a dollar max, or a flat dollar discount amount. A new function **32=Discounts** has been added to select a discount. If a counterperson is authorized to discounts, he may add or remove discounts from parts tickets. There is a new security option in the Counterperson area of the Parts Department Application Environment that controls discounts security.

**Tax exempt core returns** – A new option has been added to the General Ledger tax group setup to exclude core returns from tax. If this preference is selected, tax will be charged on a clean core sale, but the core refund will not refund the tax. To change this option, a user authorized to General Ledger Application Environment can select the tax group and set Core Returns = N.

**Enhanced part return tracking** – A new feature has been added to help track parts returns that are not placed back in inventory. When generating a return, the counterperson is presented with the question of whether to return the part to inventory. If he responds with a “No”, the quantity for that part is not increased. The system automatically puts a comment on the invoice that says, “Returned from Inv# 5107330-- Not to inventory.” In the part history, it shows that the part was not returned to inventory.

**Returns not to inventory on Returns Analysis** – A new option has been added to Returns Analysis that lets you look at only parts returns that were not returned to inventory. To see this new option, an authorized user can take option **20=Transaction Analysis** from the Parts Inventory & Invoicing menu and take option **1=Select** by Returns Analysis. If you want to see only parts that were not returned to inventory, set the prompt Include Returns to Inventory = N.

**Option to print parts labels with picking tickets** – A new feature has been added that will print automatically print labels for the parts when a picking ticket is printed. The label prints on a Zebra LP2824 label printer on 2¼" X 2½" labels. The labels include the following information:

- Invoice/repair order number
- Date
- Customer name
- Part number
- Part description
- Quantity
- Net price
- Technician ID
- Counterperson ID
- barcode

Call ARKONA Customer Support for assistance getting the picking ticket label printer working.

**Option to include 12-month demand history on counter pad** – A new option has been added to the counter pad report to include the parts' last 12 months' demand. To print the counter pad with the demand history, take option **24=Reports** from the Parts Inventory & Invoicing menu and take option **1=Select** by Counter Pad. Set Print 12 Month Demand = Y.

Note that when this option is selected, the report turns to landscape orientation and will require more paper to print because less parts will print on each page.

**Option to print retail barcode label from Parts in Inventory** – A new option has been added **10=Parts in Inventory** that will print a small retail label for a part number on demand. To print a label, take option **10=Parts in Inventory** from the Parts Inventory & Invoicing menu and position to the part number. Take option **7=Print Barcode Label** by the part number. This option prints one label for each of the quantity on hand. This label is printed from the new ARKONA-supported Zebra LP2824 in-line label printer. Please contact the ARKONA Sales Department.

# Payroll & Personnel Management

ARKONA Spurs Release  
Spring 2006

**Employer contributions to employee deductions** – A new feature has been added to allow you to contribute money to an employee's fund under a deduction code other than 401K. When the deduction is on a check, the employer contribution is computed and credits the GL account specified in the new Employer Contributions window in the Deduction Code definition.

Please consider the following about this feature:

1. A new prompt has been added to the Deduction Code Update/Add window that lets you configure the employer contribution to a deduction. Set Contribution = Y to display the Employer Contribution window when you press [ENTER].
2. Employer contributions can be limited to an annual dollar amount.
3. Employer contributions can be calculated in four ways:
  - a. **Flat dollar amount** – the employer contribution is limited to the dollar amount designated in the deduction code definition.
  - b. **Annual limit divided by # of pay cycles** for employee in a year – For example, Monthly = 12, Semi-monthly = 24, Bi-weekly = 26, or Weekly = 52. Use the flat dollar amount type, but leave the amount blank and key in the annual limit.
    - i. Note: an odd last contribution may be possible.

**Example 1:** Annual limit of \$600 divided by 26 = \$23.077. Bi-weekly contribution is computed at \$23.08.  $\$23.08 * 25 = \$577$ ; odd last contribution is  $\$600 - \$577 = \$23$ ;

**Example 2:** Annual limit of \$100 divided by 12 = \$8.333. Monthly contribution is computed at \$8.33.  $\$8.33 * 11 = \$91.63$ ; odd last contribution is  $\$100 - \$91.63 = \$8.37$ .
  - c. **Percent of the employee deduction amount** – the employer contribution is equal to the product of the employee's current deduction amount and the percent keyed into the amount field up to the annual limit.
  - d. **Percent of gross pay** – the employer contribution is equal to the product of employee's gross pay and the percent keyed into the amount field up to the annual limit.
4. The employer contribution is only computed on pay cycles when the deduction is taken.
5. If the deduction is flagged to be taken on a pay cycle, the employer contribution will compute even if the employee amount is zero.

6. The employer contribution can be set to credit the cash in bank account in the Employer Contributions window.
7. A new line was added to the Distribution Code definition screen for the expense of the employer contribution.
8. The computed employer contribution can be seen in the **F10=Tax Override** window accessed from the Payroll Entry screen.
9. The employer contributions have been added to the Quarterly Tax Summary and Payment Totals reports right after the line for Employer Retirement.
10. The employer contribution has been added to the Employee Deduction Summary report.

**Display direct deposit summary on the History Display** – A summary of the amounts deposited directly into the employee's account will display on the History Display screen with the other check details. To see the History Display, take option **40=Employees** from the Payroll and Personnel Management menu and take option **5=Display** by an employee. Take option **5=Display** again by the check.

**Direct deposit clearing account** – A new preference has been added to the Payroll System Preferences Accounting setup that allows you to combine all of the direct deposit cash entries into one GL entry to facilitate bank statement reconciliation. For example, when a direct deposit file for 75 employees is transmitted to your bank and the bank summarizes the transactions into one debit to your bank statement, you'll want the same amount to show in your GL bank account rather than the 75 individual credits to cash. When the payroll is posted using this preference, the direct deposit clearing account will receive a credit for each employee's direct deposit amount and a debit to offset it.

The distribution report is changed slightly to accommodate this preference with a clearing account summary at the bottom.

To use this direct deposit clearing account, take option **50=Application Environment** from the Payroll & Personnel Management menu and take option **1=Select** by Payroll System Preferences and take option **2=Change** by Federal Values & Account Setups. Key in a general ledger account on the Clearing Account for Direct Deposits line. If you don't wish to use this preference, you can key in the key word BLANK.

**Direct deposit for payroll deductions** – New functionality has been added to Payroll & Personnel Management that lets you transmit direct deposit information about deduction codes withheld from employees' checks. For example, if your employees contribute to a health savings account, the money can be deducted from their pay when their check is created and transmitted to their HSA with direct deposit. Any employer contribution to the deduction code (as explained in the prior entry in these release notes) will also be transmitted in the direct deposit batch.

Please consider the following about this feature:

1. You can add a deduction code to the direct deposit information on the employee master record. Put the deduction code in the Ded\* column. To do this, an authorized user can take the following steps:
  - a. Take option **40=Employees** from the Payroll & Personnel Management menu to display the Employee Master list screen.
  - b. Take option **2=Update Master** by an employee and use function **F10=Additional Data** to display the Direct Deposit Data area.
  - c. Position to the Deposit Routing #\* field and hit F4 to display the Multiple Direct Deposit Definitions window.
  - d. Key in the deduction code in the Ded\* column along with the account and routing information and other required information.
  
2. On the Multiple Direct Deposit Definitions screen, the Percent column has been changed to the Type column. Valid types are:
  - a. P = Percent
  - b. A = Amount
  - c. Blank = Deduction

**Option to print employer contributions on check stub** – An option to print the employer contribution has been added to the General System Setup window in Payroll System Preferences. When this flag is set to Y, 401K and all other employer contributions will print on the check stub. On the line after deduction code prints on the check stub, the words EMPLOYER CONTRIBUTION will print indented, with the current and YTD amounts.

**Option to print Direct Deposit Report on demand** – An option to reprint the Direct Deposit Report has been added to the main reports menu. To reprint a Direct Deposit Report, take the following steps:

1. Take option **40=Employees** from the Payroll & Personnel Management menu and use function **F7=Print** to display the Select Reports menu.
2. Take option **1=Select** by Direct Deposit Report on the right, and press [ENTER] to display closed payroll batches.
3. Take option **1=Select** by the batch and press [ENTER] to print the report.

**Prevent duplicate direct deposit transmissions** – Once you respond affirmatively to the question of whether the direct deposit transmitted successfully, you will not be allowed to retransmit. This is to prevent inadvertent or malicious retransmission of the direct deposit information to your bank. In the case where the direct deposit file was not

transmitted successfully and you tell the system that it was, the batch can be transmitted by ARKONA. Please contact ARKONA Customer Support for help in this situation.

**Direct deposit transmission log** – The user ID, date, and time of direct deposit transmission is recorded and can be viewed from the Direct Deposit Batch Selection screen. To see this screen, take the following steps:

1. Take option **35=Report to Outside Parties** from the Payroll & Personnel Management menu and take option **1=Select** by Direct Deposit Transmission.
2. Hit F4 on the Payroll Batch\* field.

**Tax report tax override warning** – A new feature has been added to the tax reports that shows FICA, Medicare, FUTA, and SUTA taxes that have been overridden. An ‘ \* ‘ is placed next to the amount on the report that has been overridden and the employee name whose taxes has been overridden appears at the bottom of the report.

**Extend employee class security to reports** – The employee class security has been extended to payroll reports. Employees that are at a higher security class than the user printing any payroll report will be left off of the report. Option **7=Print** will not work from the Employee Master screen in option **40=Employees** when it is used on an employee with a higher security class than the person trying to print the report. Security class authorization is set in the System Environment User Security for the Payroll application. Note: Employee class 5 is considered a higher level of security than class 1 and a user must be authorized to a specific class to see those employees on the report.

**Import of commission chargebacks** – The import program has been modified to include chargebacks added through option **32=Chargebacks/Commissions** on the Business Office menu. When a chargeback is added for a salesperson, you must specify whether the chargeback should be included with his new or used sales commission.

# Service Department

ARKONA Spurs Release  
Spring 2006

## Automatic Dispatching Enhancements

This release focuses heavily on changes to the automatic dispatching functionality of the Service Department Application. Listed below are several enhancements to dispatching.

**Sort Shop Status screen by estimated start time** – This functionality allows you to see the order in which the jobs are queued to be dispatched. Remember that which repair order is actually dispatched next depends on the skill level of the next technician to request a job. When you sort the Shop Status screen by start time, the Promised Time column is replaced with the Start Time. To sort the Shop Status screen by Start Time, take the following steps:

1. Take option **5=Dispatching Management** from the Service Department menu to display the Shop Status screen.
2. Use function **F6=Selection** to display the Sort and Select window.
3. Put a 1 by Start Time and press [ENTER].

Note that you can also sort by start time within a technician sort if multiple lines are pre-assigned to technicians.

**Limits for holds moved to the technician level** – The limits for holds and returns to dispatching has been moved from the shop level to the technician level. This means each tech must have his own settings for the number of returns to dispatch and holds allowed for approval, parts, other, and comments. To set these limits for a technician, an authorized user can take option **50=Application Environment** from the Service Department menu and take option **1=Select** by Technicians. Take option **2=Change** by the technician ID and set the limits.

**Option to end jobs on hold** – A technician can now end time on a job on hold without starting the time. Use the same *En* function to end a job on hold.

**Preferred customer priority** – A new preference has been added to the Service Dispatching Values to give a preferred customer a higher priority in the dispatching queue. Key in a number of minutes to subtract from the recommended start time in the Preferred Customer Buffer field.

**For example**, if a job has a promised time of 4:00 p.m. and 1 hour of estimated time to complete, the estimated start time will be 3:00 p.m. If the preferred customer value is set at 30 minutes, that will move the estimated start time to 2:30 p.m.

A preferred customer is defined as a customer who purchased the vehicle from the dealership. The preferred customer status will only apply to customers who purchased their vehicle from the dealership after the dealership went live on the ARKONA software.

**Scheduled appointment priority** – A new preference has been added to the Service Dispatching Values to give a customer with a service appointment a higher priority in the dispatching queue. Key in a number of minutes to subtract from the recommended start time on the Scheduled Appointment Buffer field. See the example for preferred customer priority.

**Fleet customer priority** – A new preference has been added to the Service Dispatching Values to give a fleet customer a higher priority in the dispatching queue. Key in a number of minutes to subtract from the recommended start time on the Fleet Customer Buffer field. See the example for preferred customer priority.

The system determines that the customer is a fleet customer if the vehicle being serviced was sold with a sale type of fleet.

**Option to put all lines on hold at same time** – A new function has been added for the technician to put all lines on a repair order on hold at the same time. To do this, use function **HALL**. Note that the jobs go on hold with a status of “Hold-Other” so the number of lines being placed on hold cannot exceed the “Hold Other” limit for that technician.

**Turn status red for disabled repair orders on Dispatching Management screen** – When a technician logs on to a repair order and places lines on hold and disables the repair order, the Hold status on the dispatching management screen turns red to indicate that the repair order has been disabled.

**Option for technicians to see pre-assigned repair orders** – A new preference has been added to the Technician record that lets a technician see repair orders that have been pre-assigned to the technician by overriding the automatic dispatching system. When the technician enters the Technician Time Log, repair orders assigned to him will appear beneath the “Select Next Repair Order” line. To authorize a technician to see the pre-assigned repair orders, the dealership ARKONA security officer can take option **50=Application Environment** from the Service Department menu and take option **1=Select** by Technicians. Take option **2=Change** by the technician ID and set Show Assigned ROs = Y.

**Option for technicians to display a repair order in inquiry mode** – A new option **5=Display** has been added to the Technician Time Log screen to let a tech review a repair order in inquiry mode. The option lets the tech see the repair order, but none of the functions are active.

**Indicate which jobs are waiters on Shop Status screen** – When the service advisor blanks out the time promised to indicate that the repair order is for a waiter, that job will show in the Shop Status screen with “Waitr” in the Promised Time column. To see the Shop Status screen, take option **5=Dispatching Management** from the Service Department menu.

**Option for more than one tech to be assigned to a job** – A new option has been added to Dispatching Management that lets you assign a second tech to a line where a first tech has already been assigned. Both techs can start and end time separately on the line. There is only one place for the correction/cause text so the techs can combine their comments into one story. To do this, an authorized user can take option **5=Dispatching Management** from the Service Department menu and take option **6=Add Tech** by the job you want to add the second tech to.

**Enhancements to Labor Profit Analysis** – Three new features have been added to Labor Profit Analysis.

1. **Select by Technician** – An option to run Labor Profit Analysis by technician has been added to the report selection screen. When you take option **21=Labor Profit Analysis** from the Service Department menu, you can run the report for service writers or technicians.
2. **Totals by Payment Method** – A new prompt has been added to the Labor Profit Analysis report selection screen to get totals by line payment method. When this preference is selected, the results display a line for each payment method for each service writer or tech. A total for the service writer or tech is also displayed, with a grand total for each payment method at the bottom.
3. **Alternate view to see gross dollars** – A new function **F11=Alternate Views** has been added. When you use this function, the labor gross amount is replaced with the labor cost amount.

**Preload technician ID in flagging screen** – When a technician has logged actual time on a job, his tech ID will be automatically loaded into the Technician\* field when adding flag time to the job in the repair order.

**Restrict certain labor operations from being on a repair order for a “waiter”** – A new prompt has been added to the Labor Operation Codes screen that will restrict the labor operation from being placed on a waiter ticket. If the

advisor tries to make a repair order a “waiter” and it has a restricted labor op code on it, a warning message will display that says: “Labor operation OPCODENAME not allowed for waiting customer”. The advisor must return to the repair order screen. To set this preference on a labor operation code, an authorized user can take the following steps:

1. Take option **50=Application Environment** from the Service Department menu and take option **1=Select** by Labor Operation Codes.
2. Position to the labor op code and take option **2=Change** by the code.
3. Set the field Allow Waiter = N.

**Maximum time allowed for waiters** – A new Service Dispatching Value has been added to put a limit on the number of minutes a customer is allowed to wait for a job. If the advisor tries to make a repair order a “waiter” and the total number of estimate minutes on the repair order exceeds the limit, a warning will display that says: “Maximum time allowed for waiting customer is exceeded. Time cannot exceed nnn minutes.” The advisor must return to the repair order screen. To set the maximum wait time for waiters, an authorized user can take the following steps:

1. Take option **50=Application Environment** from the Service Department menu and take option **1=Select** by Initial Values.
2. Press [ENTER] twice to display the Service Dispatching Values and key in the number of minutes in the Maximum Wait Time field.

**Maximum number of waiters allowed** – A new Service Dispatching Value has been added to limit the number of customers that are allowed to be designated as waiters. If the advisor tries to make a repair order a “waiter” and the total number waiters in the shop exceeds the limit, a warning will display that says: “Maximum number of waiters allowed has been reached”. The advisor must return to the repair order screen. To set the maximum number of waiters allowed, an authorized user can take the following steps:

1. Take option **50=Application Environment** from the Service Department menu and take option **1=Select** by Initial Values.
2. Press [ENTER] twice to display the Service Dispatching Values and key in the number of waiters allowed in the Maximum Number of Waiting Customers field.

**Display hold comments for technician** – The comments entered by the technician when a line is placed on hold for any reason will display on the technician’s Repair Orders screen.

**Estimated time exceeded indicator** – When the actual time on a job exceeds the estimated time on the labor operation code, the estimated hours turn red on the Dispatching Management screen and on the Repair Order entry screen.

**Returns to dispatch indicator** – A new red indicator has been added to the Dispatching Management views that turns on when a line has been returned to the dispatcher. Look for the work “Returns” in red on the upper right area of the screen.

**Enhanced messaging** – Several changes have been made to the internal messaging system.

1. Automatic messaging – Three new automatic messages have been added to the internal messaging system:
  - a. **Message when line placed on hold** – The system automatically generates a message from the technician to the service advisor when the technician places a line on hold for any reason. The message displays the hold comments entered by the technician as the reason the line was placed on hold and is stamped with the date and time the line was placed on hold.
  - b. **Message when last line on repair order is finished** – The system automatically generates a message from the technician to the service advisor when the last incomplete line on the repair order is finished by the technician. The message is stamped with the date and time the last line was finished.
  - c. **Message when line is returned to dispatcher** – The system automatically generates a message from the technician to the service advisor when the technician returns a line to dispatcher for any reason. The message displays the comments entered by the technician as the reason the line was returned to dispatch and is stamped with the date and time the line was returned.
2. Broadcast messaging – You can now send a message to more than one individual at a time. For example, a service advisor can send a message to all technicians or a list of technicians.
3. Simultaneous messaging – You can now send the same message to more than one type of user at the same time. For example, a tech can send the same message to a service advisor and a counterperson.
4. Intra-group messaging – You can now send a message to other people in your same group. For example, service advisors can send messages to other service advisors, techs to other techs, etc.
5. Messaging for dispatch manager – The messaging system is now available to the dispatcher from the Dispatching Management screen with function **F10=Messages**.

6. Option to view sent messages – Function **F11=Sent** appears at the bottom of the Message Selection window so you can view messages you have sent. Use function **F11=Received** to return to your inbox.
7. Automatic message clearing – Undeleted messages will be automatically cleaned out after 30 days.

**Tighter security for closing warranty repair orders** – A user may no longer close any repair order with a warranty line unless the security option Authorize Cashier to Close Warranty = Y. To see this security option, the dealership ARKONA security officer can take option **7=User Security** from the System Environment menu, position to the user ID, and take option **2=Change** by the user. Take option **1=Authorize** by Service Department and the option is on the first screen of security options. Prior to this release, this security option would only prohibit a user from closing a repair order if all of the lines were warranty.

**Adding feedback to an appointment** – You can now use function **75=Feedback** to add comments to an appointment.

**Hard card for parts can be printed with customer hard card** – The option to print a hard card to parts has been added to function **50=Customer Hard Card** from the Repair Order entry screen. This allows the service advisor to send a hard card to parts even when the shop is not using a technician hard card.

**New method of computing labor cost on repair orders** – You can now compute labor cost as a percent of the retail amount of the labor. To accomplish this, key the percent in the technician's labor rate field. Any amount in the tech's labor rate field less than \$1.00 the system will view as a percent. The labor cost will compute as a percent of the labor sale amount whether it is an actual retail amount or the product of the hours and the retail labor rate.

**Security change to the actual labor amount override** – A new security option has been added to service writer security that restricts their ability to override the actual retail amount on a labor op code. To authorize a user to override the actual labor amount on a labor op code, an authorized user can take option **50=Application Environment** from the Service Department menu and take option **1=Select** by Service Writers. Take option **2=Change** by a service writer ID and set Change Actual Retail Amount = Y.

**Add retail amount to Technician Time Report** – A new column has been added to the Technician Time Reports for labor retail amount. This column only appears if you set Print Cost = Y when requesting the report.

**Actual retail labor amount tied to technician(s)** – You can now change the actual retail labor amount for each tech on a job. This feature allows you to split the retail labor amount between the technicians. This only applies to labor op codes that do not have a preset actual retail labor amount.

**Option to automatically allocate the labor retail amount** – A new preference has been added to the Initial Values area of the Service Department Application Environment that lets the system automatically allocate the retail labor amount between multiple technicians for a labor op with a preset labor amount. The allocation is based on the ratio between the individual techs' flagged hours and the total hours flagged on the job. To set this preference an authorized user can take option **50=Application Environment** from the Service Department menu and take option **1=Select** by Initial Values. Set the prompt Distribute Actual Labor = Y.

**New labor op code distinction** – You can now store two different kinds of labor op codes in the Labor Operation Codes area of the Service Department Application Environment: 1) labor operation codes, and 2) correction codes. This lets you segregate all of your warranty correction codes from the labor operation codes used on the repair orders. To change the type on a labor op code, an authorized user can take the following steps:

1. Take option **50=Application Environment** from the Service Department menu and take option **1=Select** by Labor Operation Codes.
2. Position to the labor operation code you want to change and take option **2=Change** to display the labor op information.
3. Use the Correction field to identify the type:
  - a. Y = Warranty correction code
  - b. N = Labor operation code

In the Service Department Application Environment, when you are in the labor operation codes, the default view excludes the warranty correction codes. Use function **F11=Correction** to see the correction codes. Use function **F11=Inactive** to see the inactive labor operations and correction codes. Use function **F11=Op Codes** to see the labor operation codes.

To print a list of a specific type, use function **F18=Print** on the screen showing the codes you want. For example, if you want a list of inactive codes, use function **F11=Inactive** to display the inactive codes and hit **F18=Print**.

The same functionality exists from inside a repair order when you use function **40=Select Labor Operation**. The system defaults to the labor operation codes and you can use function F11 to see the warranty correction codes.

In the tech time flagging window, F4 on the Labor Op Code\* field defaults to a list of the warranty correction codes and you can use function F11 to see the labor operation codes.

# System Environment

ARKONA Spurs Release  
Spring 2006

**Security on factory reports** – To access menu option **61=Factory Reports** on the Parts Inventory & Invoicing menu or the Service Department menu, you need to be authorized to reports in the System Environment Factory Communications application. To authorize a user to this menu option, the dealership ARKONA security officer can take the following steps:

1. Take option **7=User Security** from the System Environment menu and position to the user ID.
2. Take option **2=Change** by the user and take option **1=Authorize** by Factory Communications.
3. Set Authorize Reports = Y and press [ENTER] twice to save.