



BMS v30 version history

For Autopart and Trader



Driving Business Performance

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Introduction

This guide serves as a version-by-version guide to what has changed in each version of the Autopart and Trader Business Management Solutions.

Clicking the link to a particular version will open the full document for the version.

Updates are marked as **Default** where they are automatically enabled, and **Optional** when they need to be enabled by Support. Any major developments are marked in **bold**.

Please note: numerous parameters and other settings are mentioned in the linked documents, it is recommended that you contact the Support team rather than attempting to set these yourself, as incorrect settings could cause major issues with your system.

V30R001

Please note that V30R001 was an internal release only, and was not made available to customers.

V30R002

Settings	Category	Feature	Description
Default	Misc	Old Unit Enquiry	Group and Range selections added
Default	Sales	Point of Sale	Range code used for Bought Out Parts is now written to the database
Default	Sales	Point of Sale	SISACCT field from Customer File Maintenance is now written to the database when a surchargeable part is sold
Default	Sales	Point of Sale	Figures now show in the appropriate currency
Default	File maint	Min/Max Recalc	Force positive Min/Maxes to be calculated
Default	Purchasing	Suggested Ordering	Screen grid can now be sorted by a column by clicking its header
Default	Purchasing	eBis Ordering	Automatically update outstanding purchase order quantity on receipt of XML acknowledgement
Optional	Misc	Loyalty module	New module allows awarding of loyalty points to customers, which can be redeemed at a later date.
Optional	Misc	Part Search	New Company checkbox shows parts with company stock
Optional	Misc	Multiple	Option to hide the Help button in most BMS screens
Optional	Misc	Driversboard	Prompt that a van has already departed when attempting to depart run
Optional	Sales	Sales screens	A Clone Invoice button can be added, this allows an already existing invoice to be duplicated
Optional	Sales	Point of Sale	Suppress prompts (such as the part being out of stock) when importing parts
Optional	Sales	Multiple	Allow reporting on which branch a backorder/picknote/quote/suspend was raised at when it has been invoiced
Optional	Sales	Picknotes	Sort kit components into location order
Optional	Sales	Credits	Allow cash credits to be raised against an invoice that was not paid in cash
Optional	Purchasing	Suggested Ordering	Extra product field selections work on "containing" rather than "exact match" logic
Optional	File maint	Special Terms	Customer-specific list prices can be set by uplifting prices for all parts by a percentage
Optional	Stock control	Predeliveries	Add Package Cost box, which works the same way as the one in Goods Receiving
Optional	Stock control	Returns Enquiry	Show full returns note value in addition to returns log value

V30R003

Settings	Category	Feature	Description
Default	Sales	Picknotes/invoices	Special instructions from multiple picking notes are now passed to the resulting invoice
Default	File maint	Customer x-refs	By default, the Price field in Customer cross references will be prefixed with a currency symbol when the price is not in the local currency
Default	Purchasing	Suggested Ordering	The Suggested ordering grid can now be sorted by any column by double clicking its header
Optional	Misc	Driversboard	Prompt to advise the user of picking notes that could be added to a run when it is departed.
Optional	Sales	Sales Order Entry	Automatically trigger the Lost Sales screen if there is not enough stock available
Optional	Stock control	Stock Enquiry	Add stocked under parts' back order quantities to those of the part entered
Optional	Stock control	Stock Enquiry	Add new QC Stock and Goods In qty fields, which show stock in those two locations in WMS. These fields can both be set to include stock against stocked under parts
Optional	Stock control	Bin Card Enquiry	Include backorder quantities against stocked under parts
Optional	Stock control	Manual Stock Allocation	Stop stock from being allocated when the customer is on stop, or exceeding their credit limit
Optional	File maint	Block changes	Allow block deletion of barcodes entered into the Barcodes tab of Product and Price File Maintenance

V30R004

Settings	Category	Feature	Description
Default	N/A	N/A	No default settings have been changed in this release
Optional	Misc	Printing	Documents can now be printed in descending order by Location
Optional	Sales	Point of Sale	The "Last Sold" text which displays the date and cost from when a part was last sold to the entered customer can now be configured to always show at the top of the box
Optional	Purchasing	Suggested Ordering>Returns	Up to five extra fields from the SUPPLIER table can now be added to the grid
Optional	Stock control	Stock Enquiry	A total for the part's customer impress stock will now be shown at the bottom of the screen
Optional	Stock control	Manual Stock Allocation	The parameters used to control how on stop and over credit limit customers are handled (introduced in V30R003) have been renamed
Optional	File maint	Min/Max Recalculation	A new Buffer Stock feature has been added, this allows an additional number of units or a percentage to be added to the calculated order points for safety
Optional	File maint	Block Changes	New Usage Transfer option allows the usages from a part marked as "While Stocks Last" to be transferred to the part it is to be superseded to
Optional	Dayend routine	Dayend routine	Outstanding picking notes can now be converted to invoices on the dayend. This can be set to run for all documents, ones with a specific delivery method, or only picking notes where some items have been picked

V30R005

Settings	Category	Feature	Description
Default	Misc	Customer Search	A Restricted Search checkbox has been added, if this is checked, the restrictions (for example branch) that have been configured in the spec will apply to the search
Default	Sales	Incoming orders	Mobile numbers sent on an incoming XML order will now update the customer record
Default	File maint	Customer Core File	Two extra fields have been added to add a markon percentage to the Core In and Core Out
Default	Stock control	Suggested Returns	Branch will display in the Progress section as the results are generated
Default	Stock control	Suggested Returns	When lines are selected in the grid, the value of the core for the selected lines will show in the Progress section
Optional	Sales	Bought Out Parts	It is now possible to set a separate Surcharge In and Surcharge Out against a Bought Out Part.
Optional	Sales	Point of Sale	When transactions are raised for certain customers, the operator will be required to enter an Order Line Number
Optional	Sales	Credit Notes	A second reference field can be added to the header of the Credit Notes screen, this can be captioned as required. The field can also be added to any XML credits that are sent
Optional	Sales	Deallocation	Balance column shows items that are still to be scanned prior to dispatch
Optional	Sales	QJI	A credit can now be retrieved and a job generated with the same lines by using the Reuse Job button. This can be restricted to certain credit reason codes only
Optional	Purchasing	Internal POs	Automatic printing of jobs as they are created can be disabled
Optional	Purchasing	Internal POs	When the Assign Jobs button is clicked, the screen can be set to refresh to show completed jobs
Optional	Stock control	Stock Adjustments	A stock adjustment with a value of zero can now be made
Optional	Stock control	Stock Leveling	Transfers made via Stock Leveling can be set to not update usages
Optional	Stock control	Returns	Suppliers can now have additional addresses set against them which returns can be raised to
Optional	File maint	Product and Price File Maintenance	Enhancement to the allocation of an internal reference number upon creating new part numbers. This setting has been enhanced so that when a user creates a new part via the Alternatives tab of Product and Price File Maintenance this parameter will be read and applied.
Optional	Ledgers	Receipt of Payment	The spec used for the ROASLIP (document printed when a payment is taken on account) can now be made graphical

V30R006

Please note that V30R006 was an internal release only, and was not made available to customers.

V30R007

Settings	Category	Feature	Description
Default	Purchasing	FPS Ordering	FPS are now able to return quantity break data in response to queries
Default	Stock control	Stock Enquiry	The Known As field from Product and Price File Maintenance is now visible in Stock Enquiry
Default	File maint	VAT Codes	VAT Code File Maintenance - VAT codes will now be sorted in ascending order
Optional	Misc	Document enquiries	Customer Name and Customer Order Number fields can be added to the grid
Optional	Sales	Collection Notes	Quit button returns to enquiry screen rather than closing the Collection notes screen entirely
Optional	Sales	Sales screens	The checks for existing customer order numbers have been enhanced
Optional	Sales	Sales screens	The price override Reason Code selection box has been updated, it is now bigger and shows more codes at once
Optional	Sales	Point of Sale	Refunds: Parts with surcharge lines will be grouped together on the suspended return
Optional	Sales	Point of Sale	Refund lines with quantities greater than 1 will generate multiple suspended returns, each with a quantity of 1
Optional	Sales	Deallocation and Dispatch	A maximum number of days in the future that the date set in the Enter Document Date prompt can be enforced, this can be overridden by an optional password
Optional	Sales	Point of Sale	When transactions are raised for certain customers, the operator will be required to enter an Order Line Number. This can be coded so that this will not be required for certain product groups
Optional	Sales	Surcharge Bank	A prompt for Customer Order Number can be added when invoicing a banked surcharge
Optional	Sales	Credit Notes	Credit lines can now be rejected, and a reason for rejection specified
Optional	Sales	Credit Notes	The second credit reference field can now be sent on XML documents
Optional	Sales	eBis/Point of Sale	Incoming XML orders can now accept zero prices as they are invoiced via Point of Sale

Settings	Category	Feature	Description
Optional	File maint	Customer File Maintenance	Customer X-Ref Link field can be used to share customer x-refs against the account entered with the one currently loaded in Customer File Maintenance
Optional	Purchasing	Suggested Ordering	A new M/N Flag (X) has been added which will exclude the part from suggested orders at that branch
Optional	Purchasing	Generate Purchase Orders	It is now possible to perform an electronic pricing and stock enquiries for Teccom, G-Net, FPS, Openwebs (AP-to-AP), and EDIWheel orders
Optional	Purchasing	XML Purchase Orders	The XML format used by BASF Glasurit can now be used, this is done by setting EDI Style to G in the Supplier File Maintenance screen's Rep and EDI Information tab
Optional	Stock control	Stock Usages	Changes to how average usages are calculated: A breakpoint for when the current month will be included can be set, it can be excluded entirely, or all three figures can be set to show
Optional	Stock control	Manual Stock Allocation	Part Number and Description column can be replaced with Part Number and Stock Under
Optional	Stock control	Manual Stock Allocation	Stock against part numbers flagged with the location "Excluded from stock" in WMS will be excluded
Optional	File maint	Customer Surcharge File Maintenance	Changes to how surcharges are applied to multiple parts: Range can now be specified as a Ref, and The order of precedence for references (e.g. Product, Group, Range) can be specified
Optional	File maint	Min/Max Recalculation	The Buffer Stock feature (introduced in V30R004) has been enhanced to allow the entry of negative values

V30R008

Settings	Category	Feature	Description
Default	Misc	EMI	The logic used to calculate operator sales has changed, the credit amount will be taken out of the sales for the operator who raised the original invoice, rather than the one who raised the credit. This logic can be changed to the default setting if required
Default	Stock control	Returns Enquiry	A box showing the Total Quantity of parts on the return now displays at the bottom of the page
Default	File maint	Block Changes	Customer Cross References can now be imported, amended, and deleted
Default	File maint	Block Changes	Adjustments made to a part's average or latest cost via the Block Changes Misc tab are now written to the bincard as an adjustment for auditing purposes. This can be disabled if required
Optional	Misc	EMI	As mentioned above, the process used to calculate an operator's sales value has been changed. This can be returned to the previous logic if required
Optional	Sales	Sales screens	By default, a setting can be made that will cause a picknote to be generated when the Cash button is clicked. A new setting means that a prompt will pop up asking if a cash invoice or picknote should be generated
Optional	Sales	Sales Order Entry	When a on-file bought out part (# part) is entered into Sales Order Entry, the whole quantity will be allocated regardless of how much stock is available. The user can still manually amend the quantity if required
Optional	Sales	Point of Sale	It is now possible to set all lines in a transaction as "Exceptional" sales. Previously, this needed to be done on a line-by-line basis
Optional	Sales	Point of Sale	Delivery method can be defaulted to a specific setting if the document is an IBT or if it contains a Bought Out Part
Optional	Sales	eBis	Delivery addresses on incoming XML orders can be ignored in favor of the one held on file
Optional	Sales	QJI	When a user attempts to add a line as a Direct Delivery (by adding a D in the quantity column) a password prompt can be added
Optional	Purchasing	Supplier/Customer Notes	Suggested Ordering/Generate Purchase Orders - Notes button can be set to display notes from specific departments
Optional	Purchasing	Supplier/Customer Notes	Purchase Ledger Invoice Entry, Cash Posting, and Account Enquiry - Automatically display Supplier notes when after the supplier account code is entered

Settings	Category	Feature	Description
Optional	Purchasing	Supplier/Customer Notes	Highlight the last note saved in the grid
Optional	Purchasing	Supplier/Customer Notes	Sales Ledger Invoice Entry, Cash Posting, and Account Enquiry - Automatically display Customer notes when after the customer account code is entered
Optional	File maint	Special Terms File Maintenance	Customer list prices feature (introduced in V30R002): Rules can be applied on a part, group, or range level, and Prices can be based on an existing selling level, or the customer's, by using the FINAL option
Optional	File maint	Block Changes	The previously mentioned auditing function for changes made to average/latest cost via Block Changes can be disabled

V30R009

Settings	Category	Feature	Description
Default	Misc	Printing	It's now possible to print a single PDF from the consolidated invoicing screen
Default	Sales	QJI	Development has been completed so that any parts backordered through QJI can now be ordered from a secondary supplier and the link to the original job will now be maintained
Optional	Misc	Emailing	A "Reply To" address can now be selected when manually emailing a document
Optional	Misc	Pricing	The Trader Volume Quantity Pricing option is now also available in Autopart
Optional	Misc	Warranty	A product-specific expiry date can now be set in Product and Price File Maintenance
Optional	Misc	QJI	QJI back orders can now be processed within Sales Backorder Management
Optional	Sales	Sales screens	Allow modification of text for the "selling below cost" password prompt
Optional	Sales	Sales screens	Mixed Rate Quantity Break information is now visible in the Pricing Details Grid
Optional	Sales	Driversboard	Van routes are automatically allocated to transactions when they are received via an XML processed by Autocomms
Optional	Sales	Quotations	Allow for quotation to be produced where some lines are to be sourced from another branch
Optional	Sales	Quotations	The invoice number can now be shown as a column in the Quotation Enquiry screen
Optional	Sales	QJI	Development has been completed so that any parts backordered through QJI can now be ordered from a secondary supplier and the link to the original job will now be maintained
Optional	Stock control	Returns	Control over which users are able to reject return lines (by menu level)
Optional	Stock control	Predeliveries	Part Number column can be relocated to the left of the quantity column in the Predelivery Note Creation screen

V30R010

Settings	Category	Feature	Description
Optional	Misc	Data grids	The right click to export feature can now be locked so that only users with a certain menu level can access it
Optional	Sales	Point of Sale/Sales Order Entry	Where the system is configured to print multiple copies of documents paid for using a certain payment method, this now works where a payment has been split across two payment methods
Optional	Sales	Point of Sale/Sales Order Entry	The "Please confirm a delivery method" prompt can now be quit to return to the sales grid
Optional	Sales	Autocat v8/Point of Sale	Vehicle Make and Model from the catalogue lookup can be automatically added to the "Order Number" field
Optional	Sales	Deallocation and Dispatch	The "Would you like to print?" prompt can now be disabled and a default selection specified
Optional	Sales	Point of Sale/Sales Order Entry	A default Delivery Method can now be set against a particular operator code
Optional	Sales	Surcharge Bank Enquiry	Option to add 'old core' through Surcharge Bank Enquiry screen
Optional	Sales	Credit notes	Disallow the creation of a refund/credit for a core line attached to a new unit
Optional	Sales	Credit notes	Importing credit lines and subsequent matching to invoice lines - various options
Optional	Sales	Ebis invoices	Emailing consolidated invoices to a branch email address
Optional	Sales	Incoming Orders	Checks made to control which transactions can be automatically invoiced when received electronically and processed via Autocom
Optional	Purchasing	Purchase Order Processing	<Prev Part>/<Next Part> part option in purchase order processing
Optional	Reporting	EMI	A column can now be added to the Operator Codes File Maintenance screen that can be set to restrict which branches' EMI data that operator can view

V30R011.8

Settings	Category	Feature	Description
Default	Sales	Deallocation and Dispatch	It is now possible to scan items into the Deallocation and Dispatch screen using a barcode scanner
Optional	Misc	Main screen	By default, a banner will show at the top of the main BMS screen stating the branch code and name, this can now be hidden if required
Optional	Misc	Data export	Invoice data can be automatically exported as CSV and sent to a remote server via FTP
Optional	Misc	Route Monkey	Integration with the Route Monkey delivery route optimisation service
Optional	Misc	Document printing	Improved reprint logic for Suspends and Backorders
Optional	Sales	Collection Notes	Allow new Collection Note delivery addresses to be saved
Optional	Sales	Quotations	Quotations can now be marked as "lost" automatically after a set number of days
Optional	Sales	eBis/Sales	All parts (even those with stock) are automatically included in electronic ordering enquiries
Optional	Sales	Credit notes	The Delivery method/Order Number prompt no longer shows for Credits or POS Refunds
Optional	Sales	Automatic document creation	Documents can be set to use the customer's first delivery method by default
Optional	Stock control	Stock leveling	The parameter that locks Stock Leveling when it is in use is now global across the company
Optional	eBis	Incoming Orders	Allow manual processing of Incoming Orders received for customers that are on stop
Optional	eBis	Incoming Orders	Allow manual processing of Incoming Orders where the order number fails validation
Optional	eBis	Incoming Orders	Allow manual processing of Incoming Orders where Restrict Sales at/Over due days are exceeded
Optional	eBis	Incoming Orders	Allow manual processing of Incoming Orders where the customer has exceeded their credit limit
Optional	eBis	Electronic ordering	More prominent highlight style for the "Select" column of Online Order enquiry

Settings	Category	Feature	Description
Optional	Reporting	Reporting	Support for fill rate levels
Optional	Sales	Collection Notes	Allow Collection Notes for other branches to be generated

V30R11.16

Settings	Category	Feature	Description
Default	Sales	Consolidated invoicing	The single PDF export option (added in R009) has been enhanced to allow direct emailing
Optional	Misc	Min/Max Recalculation	A checkbox has been added to toggle whether the current month's usages should be used in calculations. This was previously only accessible via Parameter File Maintenance.
Optional	Misc	Driversboard	A "common" Drivers Board view can be set up, this will show information for all branches.
Optional	Sales	Invoice Enquiry	The initials of the operator who originated a transaction (i.e. a quote) will show in Invoice Enquiry.
Optional	Sales	Automatic document creation	Automatic Document Creation now supports customers with the "Paylater" ledger type.
Optional	File Maintenance	Stored Price Calculations	An "Only updated Parts in the Grid" checkbox has been added, this means that only parts displayed in the grid in Price Calculations File Maintenance will be affected.
Optional	File Maintenance	Pricing	Allow the price of parts to be "locked" in Point of Sale
Optional	Sales	Bought Out Parts	A field for "Weight" has been added to the Bought Out Parts form.
Optional	Sales	Credits	When a Unit of Issue is set on a part, the number of units will default to a multiple of it. If this is changed to a value that is not a multiple of the UOI, a password prompt will display. This can now be set by menu level.
Optional	Purchasing	Suggested Ordering	When usage-based Suggested Ordering is used, extra options have been added to the "Forecast Criteria" section.
Optional	Stock control	Stock Leveling	Acknowledged purchase order quantities will be taken into account when calculating overstocks.
Optional	Reporting	Reporting	The "Whole Report in Grid" checkbox can be checked by default when viewing a report.